

Death Claim Form

Fund members – Approved benefit

Section 37C of the Pension Funds Act state that, in the event of the main member's death, the Trustees of a Retirement Fund have a duty to distribute the death benefit to dependants and/or nominees in a manner that they believe to be equitable to all parties. A complex investigation and assessment is undertaken to guide the Trustees of the Fund in the fair and equitable distribution of the death benefit. The Nominated Beneficiary Form is used to guide the Trustees when allocating the benefit.

Please submit all claim forms and supporting documents to:

The National Bargaining Council for the Electrical Industry SA

Contact person: Nomsa Magagula

Phone number: 011 339 2312

Email: ecifund@nbcei.co.za or nomsam@nbcei.co.za

Head office physical address: 122 Queen Street, Kensington, Johannesburg

Name of Administrator: Phakama Administration Services

Email: claims@phakama.co.za

Fax No: +27 (0) 86 514 1115

Address: Private Bag X13, Lynnwood Ridge, 0040

Checklist

Please submit all relevant documentation detailed below so that the claim can be processed quickly. Please note that incomplete forms or documentation will result in delays in the processing of the claim. The Insurer may at their discretion request additional claim requirements to validate the claim.

- Death claim form
- Copy of death certificate
- Proof of identity of the deceased (copy of ID book/Smart Id/Passport/Birth Certificate)
- Proof of identity of the beneficiary
- Copy of the deceased last payslip
- Proof of bank account of beneficiary (bank statement or account confirmation letter from the bank confirming the account holder's full names, account number and branch code) (not older than 3 months)
- A copy of the completed DHA1663 or DHA1680 – Notice of Death Form
- Proof of address (not older than 3 months) of the beneficiary
- Police Report - completed by the Investigating Officer (in the event of Unnatural Death)
- Accident report (in the event of a Motor vehicle Accident or Pedestrian vehicle Accident)



Policy details

Policy number: _____

Name of employer: _____

Contact person: _____

Contact number: _____

Date of employment:

D	D	M	M	Y	Y	Y	Y	Y
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Employee/membership number: _____

Main member details

First name: _____

Surname: _____

Gender: Male Female

Date of birth:

D	D	M	M	Y	Y	Y	Y	Y
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RSA ID: Yes No

ID number/Passport number:

Passport country of origin: _____

Issue date:

D	D	M	M	Y	Y	Y	Y	Y
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Expiry date:

D	D	M	M	Y	Y	Y	Y	Y
---	---	---	---	---	---	---	---	---

Email address: _____

Contact number: _____

Residential address: _____

Postal address: _____

General details

Month last risk contribution was paid:

M	M	Y	Y	Y	Y	Y
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Last date the main member was at work:

D	D	M	M	Y	Y	Y	Y	Y
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Was the member receiving a disability payout at the time of death? Yes No

Deceased's details

Full name: _____

Deceased's relationship to main member (if applicable): _____

Date of birth:

D	D	M	M	Y	Y	Y	Y	Y
---	---	---	---	---	---	---	---	---

RSA ID: Yes No

ID number/Passport number:

Passport country of origin: _____

Issue date:

D	D	M	M	Y	Y	Y	Y	Y
---	---	---	---	---	---	---	---	---

Expiry date:

D	D	M	M	Y	Y	Y	Y	Y
---	---	---	---	---	---	---	---	---

Date of death:

D	D	M	M	Y	Y	Y	Y	Y
---	---	---	---	---	---	---	---	---

Exact cause of death: _____

Name of doctor who certified the death: _____

Contact number of doctor: _____

Details of claim

Date of death:

D	D	M	M	Y	Y	Y	Y	Y
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Cause of death: _____

If death is a result of an accident, please answer the questions below:

The accident occurred at (place): _____

Accident date:

D	D	M	M	Y	Y	Y	Y	Y
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Name of Police Station accident was reported: _____

SA Police case number: _____

Describe fully how accident happened: _____

Where did the deceased pass away?

- Home
- Work
- Hospital Name of hospital: _____ File no: _____
- Other Please specify: _____

Did the deceased have any other insurance policies?

- Yes Please supply details: _____
- No _____

Was the deceased on a Medical Aid?

- Yes Name of Medical Aid: _____
- No Medical Aid Number: _____

DECLARATION

This declaration should be completed by the person employed at the Council who is responsible for completing the Death Claim Form.

I do hereby warrant the above information as the truth. I authorise any hospital, clinic, doctor or other individual to furnish the Insurer with all information in respect of my claim, including any copies of medical records, consultations, medical history, sickness or injuries the deceased might have had with any institution. I have not withheld any information which could be material to the assessment of the claim.

I hereby waive any right to privacy and authorise the Insurer (or its appointed Administrator):

- to obtain from any doctor, registered healthcare practitioner, hospital, medical institution, police station, insurance company or any other person or entity, whom I hereby authorise to give and to disclose, any information which the Insurer requires or deems necessary to facilitate the assessment of the risks and the consideration of this claim for benefits under this Policy arising from this claim application; and
- to disclose any insurance information (provided by me or on my behalf to any other insurance company, either directly or through a database operated by or for Insurers as a group, at any time and in such detailed, abbreviated, or coded form as may from time to time be decided by the Insurer or by the operators of such database; and
- to verify any information provided against other sources or databases; and
- to disclose information regarding a specific policy, owner or life insured to any persons or institution provided that the Insurer considers such disclosure necessary in order to assess this claim; and
- where required through the operation of law, to disclose information regarding a specific policy, owner or life insured to regulatory and government agencies.

I further confirm that the information I have provided is true and accurate and constitutes a full disclosure of information.

Full name: _____

Signature

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Date

Anti-money Laundering Provisions and Influential Persons Declaration

The Financial Intelligence Centre Act (FICA) requires that we know if you are an influential person as explained in the Act. It differentiates between a politically exposed person, domestic prominent influential person, foreign prominent public official and a known close associate or family of domestic prominent influential persons and foreign prominent public officials. More than one of the definitions can apply to the same person. Read the explanations at the end of this form, indicate which explanations apply to you and give your reason.

<input type="checkbox"/>	Politically exposed person	<input type="text"/>
<input type="checkbox"/>	Domestic prominent influential person	<input type="text"/>
<input type="checkbox"/>	Foreign prominent public official	<input type="text"/>
<input type="checkbox"/>	Known close associate	<input type="text"/>
<input type="checkbox"/>	Family member	<input type="text"/>

Definitions of influential persons

- **A Politically exposed person** is someone who is or has been entrusted with prominent public functions, based on a specific political affiliation. **Examples:** A head of state, cabinet minister, member of parliament/local/provincial government, senior administrator in government department (financial department/tender processes), senior judge, manager of local municipalities who award tenders, senior and/or influential official, ambassador/high commissioner, senior representative of a religious organisation.
- **A Prominent influential person** refers to any individual who are or have in the past been entrusted with prominent functions in a particular country. A South African PIP would be known as a Domestic PIP. A Foreign Prominent Public Official (FPPO) would be someone who holds a Prominent Public Official (PPO) position in a foreign country. **Examples:** Premier of a province, member of a foreign royal family, government minister or equivalent senior politician, leader of a political party, high ranking member of the military/police, etc.
- **A known close associate** is an individual who is closely connected to a prominent person, either socially or professionally. The term "close associate" is not intended to capture every person who has been associated with a prominent person. **Examples:** Known relationships outside the family unit (e.g. girlfriends, boyfriends, mistresses), a prominent member of the same political party, civil organisation, labour or employee union as the prominent person, business partner or associate, especially one who shares (beneficial) ownership of corporate vehicles with the prominent person, or who is otherwise connected (e.g. through joint membership of a company board), any individual who has sole beneficial ownership of a corporate vehicle set up for the actual benefit of the prominent person.
- **A family member** is an individual who is related to a PEP/PIP either directly (consanguinity) or through marriage or similar (civil) forms of partnership. **Examples:** Spouse or civil/life partner, previous spouse or civil/life partner, children and stepchildren and their spouses or civil/life partners, parents, siblings and stepsiblings and their spouses or civil/life partners.

Declaration in respect of the protection of personal information act

Processing of Personal Information in terms of the Protection of Personal Information Act 4 of 2013

Your privacy is of utmost importance to Us. We will take the necessary measures to ensure that any and all information, provided by you or which is collected from you is processed in accordance with the provisions of the Protection of Personal Information Act 4 of 2013 and further, is stored in a safe and secure manner.

You hereby agree to give honest, accurate and up-to-date Personal Information and to maintain and update such information when necessary.

You accept that your Personal Information collected by Us may be used for the following reasons:

- to establish and verify your identity in terms of the Applicable Laws.
- to enable Us to fulfil our obligations in terms of this Policy.
- to enable Us to take the necessary measures to prevent any suspicious or fraudulent activity in terms of the Applicable Laws; and
- reporting to the relevant Regulatory Authority/Body, in terms of the Applicable Laws.

Unless consented to by yourself, we will not sell, exchange, transfer, rent or otherwise make available your Personal Information (such as your name, address, email address, telephone, or fax number) to any other parties and you indemnify Us from any claims resulting from disclosures made with your consent.

You understand that if the Administrator/Insurer has utilized your Personal Information contrary to the Applicable Laws, you have the right to lodge a complaint with Guardrisk or with the Information Regulator once established.

Claimant's full name: _____

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Claimant's Signature Date

Office use only – To be completed by the Administrator – FICA Confirmation

Is the claimant/beneficiary:	Yes	No
a Politically Exposed Person (PEP)?	<input type="checkbox"/>	<input type="checkbox"/>
a Domestic Prominent Influential Person (DPIP)?	<input type="checkbox"/>	<input type="checkbox"/>
a Foreign Prominent Public Official (FPPO)?	<input type="checkbox"/>	<input type="checkbox"/>
on a Sanction List?	<input type="checkbox"/>	<input type="checkbox"/>

Administrator full name: _____

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Administrator Signature Date