



Withdrawal of a Member – Death – Z102

#	Forms and Attachments Required Refer to the rules of the GEP Act: Without any dependants: 14.5.1: < 10 Years; 14.5.2: >= 10 Years With dependants: 14.5.1: < 10 Years; 14.5.2: >= 10 Years	Application Type	
		DEATH WITHOUT DEPENDANTS	DEATH WITH SPOUSE/LIFE PARTNER AND/OR CHILDREN
	Tick type of transaction and missing attachment(s) ►		
1.	Duly completed Withdrawal from Fund Form (Z102).	Attached	Attached
		Missing Data	Missing Data
2.	An originally certified copy of the deceased member's Death Certificate (Issued by the Department of Home Affairs).	Attached	Attached
		Missing	Missing
3.	A copy of the deceased member's ID (preferably bar-coded) or Passport .	Attached	Attached
		Missing	Missing
4.	Copy of the Nomination of Beneficiaries Form (WP1002), where available.	Attached	Attached
		Missing	Missing
5.	Duly completed Spouse's or Orphan's Pension Form (Z143) . A separate application form is needed for each spouse, major child (over the age of 18) and/or guardian for a set of orphans.		Attached
			Missing
6.	Proof of termination of service is required such as a printout of the Service Termination or Service Record from PERSAL stating the Payroll No (PERSAL No), Withdrawal reason, Withdrawal date, Salary level and notch on the last day of service of the member.	Attached	Attached
		Missing	Missing
7.	Conditional: For when a spouse is registered then an originally certified copy of the Marriage Certificate is required or alternatively an affidavit . For a Life Partnership: affidavits setting out the nature of the relationship, and indicators, (preferably with supporting documentation), of that relationship from a member of each party's family, a joint friend and/or an authorised member of any organisation, institution or society of which one or both parties has been a member.		Attached
			Missing
			N/A
8.	An originally certified copy of an ID (must be bar-coded) or Passport of the applicant / spouse – exceptions as per ID Policy.	Attached	Attached
		Missing	Missing
9.	Duly completed ACB Bank Particulars Form (Z894) for each spouse, guardian for a set of orphans, major child (over the age of 18) or the Estate/Trust.	Attached	Attached
		Missing	Missing
10.	Conditional: For debt deduction: An originally certified copy of a Court Order or Member's approval in writing for debt due to Negligence, Misconduct or Theft as per GEP Law - Section 21.3(c) or in respect of debt for more than the value of R10,000.	Attached	Attached
		Missing	Missing
		N/A	N/A
11.	Conditional: Where the deceased member had a previous marriage , an originally certified copy of the former spouse's ID (must be bar-coded) or Passport, Marriage Certificate, Death Certificate, Settlement Agreement and/or Decree of Divorce are needed. Where payments are due to an ex-spouse, an ACB Bank Particulars Form (Z894) is needed. Divorce Settlement Agreements for the division of pension interest are only effective from 1 August 1989 as per the amendment to the Divorce Act¹ and a separate Withdrawal from Fund Form (Z102) completed by the employer is needed.	Attached	Attached
		Missing	Missing
		N/A	N/A

¹ In 1989 the Divorce Act was amended to provide for the definition of pension interest in respect of pension- and retirement funds. Accordingly a portion of the pension interest may be awarded to an ex-spouse.

12.	Conditional: For any possible dependants (current marriage or previous marriage) (natural or adopted), an originally certified copy of the Full Birth Certificate or ID (must be bar-coded). Benefits will be paid to the Master of the High Court for minors. In order to establish dependency an originally certified copy of a Court Order in respect of maintenance payable where applicable.	Attached
		Missing
		N/A
13.	Conditional: If a student is applicable and over 18 years but less than 22 years, proof of registration is required from the institution. If the child is disabled and over 18, medical proof of the disability and of financial dependency is required through an Affidavit that states the amount of financial dependency and personal income of person concerned.	Attached
		Missing
		N/A
14.	Conditional: If an adopted child is applicable, an originally certified copy of a Legal Adoption Certificate (Issued by the Department of Home Affairs) is required upon which the names of the adopted parents appear.	Attached
		Missing
		N/A
15.	Conditional: For children in the care of a guardian (from current or previous marriage) (natural or adopted), a letter from a Magistrate or Master of the High Court that indicates the appointment as guardian over the children is required.	Attached
		Missing
		N/A
16.	Conditional: For when a portion of the benefit payable is due to an Estate , an originally certified copy of the letter of Executorship is needed.	Attached
		Missing
		N/A
17.	Conditional: If a Trust is applicable, a copy of the letter of authorisation from the Master of the High Court and a copy of the Trust Deed are needed. A duly completed ACB Bank Particulars Form (Z894) is required for the Trust.	Attached
		Missing
		N/A
18.	Conditional: An originally certified copy of the deceased member's Last Will and Testament (where it exists).	Attached
		Missing
		N/A
19.	Conditional: For when the surname of the person is different to the surname on the ID, Passport or Death Certificate documents, a letter from the Department of Home Affairs or Full Birth Certificate of a child is required to confirm the surname.	Attached
		Missing
		N/A
20.	Conditional: For when the Commencement Date (Service Date) is amended, then proof of contributing service is needed in the form of a copy of an appointment advice to the salary department, salary / leave record, staff record, pay slips, or IRP 5 tax certificates for the applicable years. A duly completed Membership Update Form (Z125) is also required.	Attached
		Missing
		N/A
21.	Originally certified copies of the member's last two salary advices printed from the payroll system.	Attached
		Missing
22.	Medical Subsidy Specific Attachments Required:	
a.	An originally certified copy of the previous medical scheme Membership Certificate of the deceased member and new medical scheme Membership Certificate for the spouse that is registered as the main medical scheme member.	Attached
		Missing
		N/A
b.	Conditional: An affidavit or an originally certified copy of the service records to prove additional periods of broken government service that need to be added for medical subsidy purposes to prove 10 or 15 years of government service.	Attached
		Missing
		N/A
c.	Conditional: For a contributing member, pensioner or spouse that choose a gratuity payment, a duly completed Updating Bank Particulars Form - Z894.	Attached
		Missing
		N/A
d.	A duly completed State Subsidised Medical Contribution Choice Form to choose between continued memberships (4/6 GEFP subsidised) or the payment of an once-off gratuity.	Attached
		Missing
		N/A