

# BENEFICIARY NOMINATION FORM

Coronation Life Assurance Company Limited | SARS Registration Number: 1999/005510/06  
 Coronation Retirement Annuity Fund | FSB Registration Number: 12/8/37654/R | SARS Registration Number: 18/20/4/041867  
 Coronation Preservation Pension Fund | FSB Registration Number: 12/8/37653/R | SARS Registration Number: 18/20/4/041868  
 Coronation Preservation Provident Fund | FSB Registration Number: 12/8/37643/R | SARS Registration Number: 18/20/4/041869

- All sections must be completed in full using BLOCK LETTERS.
- Indicate all options selected by means of a cross [X].
- Initial any amendments made to the application form.
- Ensure that all information provided is accurate.
- No instruction will be processed unless all requirements have been met.
- One policy number per instruction is allowed.
- The daily cut-off for receipt of instructions is 14h00.
- Forward your instruction to **(021) 680 2250** or **eflows@coronation.co.za**.
- Should you have any queries regarding this application, please contact the Coronation Client Service Centre on 0800 22 11 77.

## A PRODUCT

Living Annuity  Retirement Annuity Fund  Preservation Pension Fund  Preservation Provident Fund   
 Endowment – Beneficiary for Proceeds  Endowment – Beneficiary for Ownership   
*(only applicable if policy holder is an individual)*

## B INVESTOR DETAILS

Title: \_\_\_\_\_ Surname: \_\_\_\_\_  
 First name(s): \_\_\_\_\_  
 Unitholder number: 104104 \_\_\_\_\_ Policy number: Pol \_\_\_\_\_  
 ID/Passport number: \_\_\_\_\_  
 Contact telephone number: ( \_\_\_\_\_ ) \_\_\_\_\_ Fax number: ( \_\_\_\_\_ ) \_\_\_\_\_  
 Cellphone number: ( \_\_\_\_\_ ) \_\_\_\_\_  
 E-mail address: \_\_\_\_\_

## C1 BENEFICIARY NOMINATIONS - LIVING ANNUITY, RETIREMENT ANNUITY, PRESERVATION PROVIDENT AND PRESERVATION PENSION FUNDS

I hereby cancel all previous beneficiary appointments (if any) in respect of this investment and request the following endorsement:

	Beneficiary 1	Beneficiary 2
Surname		
First name(s)		
Relationship		
ID/Passport number		
Percentage		
Postal address		
Contact number		

	Beneficiary 3	Beneficiary 4
Surname		
First name(s)		
Relationship		
ID/Passport number		
Percentage		
Postal address		
Contact number		

If there are additional beneficiaries, please attach this information on a separate page.

## **C2** ENDOWMENT BENEFICIARY NOMINATIONS FOR PROCEEDS

Subject to Coronation Life's approval, you may nominate beneficiaries who may receive a benefit following the death of the life assured. You may alter your nomination at any time by submitting a Beneficiary Nomination Form to Coronation Life. Beneficiary alterations received after the death of the last life assured will be treated as invalid.

	Beneficiary 1	Beneficiary 2
Surname		
First name(s)		
Relationship		
ID/Passport number		
Percentage		
Postal address		
Contact number		

	Beneficiary 3	Beneficiary 4
Surname		
First name(s)		
Relationship		
ID/Passport number		
Percentage		
Postal address		
Contact number		

If there are additional beneficiaries, please attach this information on a separate page.

## **C3** ENDOWMENT BENEFICIARY NOMINATIONS FOR OWNERSHIP

Subject to Coronation Life's approval, you may nominate beneficiaries who may receive ownership of the policy following the death of the policy holder. You may alter your nomination at any time by submitting a Beneficiary Nomination Form to Coronation Life. Beneficiary alterations received after your death will be treated as invalid.

	Beneficiary 1	Beneficiary 2
Surname		
First name(s)		
Relationship		
ID/Passport number		
Percentage		
Postal address		
Contact number		

Beneficiary 3

Beneficiary 4

Surname		
First name(s)		
Relationship		
ID/Passport number		
Percentage		
Postal address		
Contact number		

If there are additional beneficiaries, please attach this information on a separate page.

## **D** INVESTOR SIGNATURE

**Please note:**

1. The beneficiary can acquire no right in or to the investment until written notice of the death of the investor (or lives assured) has been received by Coronation.
2. A beneficiary nomination will be given effect if the beneficiary survives the registered investor by more than seven (7) days.
3. According to section 37C of the Pension Funds Act, the Trustees of the Retirement Funds have a discretion regarding the distribution of death benefits on the Retirement Funds. Beneficiaries will therefore be considered but the Trustees are obligated to also consider any dependents you may have, as defined in the Act.

Signed at \_\_\_\_\_ on this \_\_\_\_\_ day of \_\_\_\_\_ year \_\_\_\_\_

Signature of investor or authorised representative\*: \_\_\_\_\_

\* Please forward proof of authorisation.

Signature of legal guardian (if signatory is a minor): \_\_\_\_\_

Financial advisor name: \_\_\_\_\_ Brokerage: \_\_\_\_\_ Code: \_\_\_\_\_