New entrant form

Fund	
Employer	
Administrator	GTC Employee Benefits Administration Proprietary Limited ("GTC")
Pay-point (if applicable)	
Pensionable Service date	
Payroll number	

1. Member details

Full name/s	
Surname	
Previous surname (if applicable)	
ID/Passport number	
Nationality	
Gender	
Date of birth	
Residential address (this is a tax application requirement)	
Postal address (if different to residential)	
Tax number	
Tax office	
Cell number	
Telephone number	
E-mail address	

2. Fund details

Date employed		Date joined fund	

3. Paid-up certificates and transfers from previous funds

(Required in terms of Regulation 38 of the Pension Funds Act)

Please provide a list of any paid-up certificates that you have been issued by any previous Pension and/or Provident Funds and complete the information below. Providing information of previous paid-up certificates and benefits is not compulsory and should you wish not to disclose or provide any information of previous paid-up certificates and benefits then please strike out the columns below.

Please advise if you wish to transfer your retirement savings from the previous funds to the current fund in respect of some or all of your paid-up benefits.

Fund name	Administrator and contact details	Transfer benefit to Fund
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐
		Yes ☐ No ☐

GTC will assist you with transferring your previous retirement savings into this Fund if applicable.

Tax considerations

- Transfers from a Provident to a Pension or Provident Fund are tax-free.
- Transfers from a Pension Fund to another Pension Fund are tax-free.
- Transfers from a Pension Fund to a Provident Fund are however taxable as per current tax law.
- Transfers from a Retirement Annuity into a Pension or Provident fund are not allowed.

Nomination of beneficiaries

A nomination of beneficiary form must be completed and lodged with the HR department of the employer.

Kindly attach a copy of your ID document with this form.

GTC EB Website

Members should be encouraged to use the web access facility. The web address is www.gtc-eb.co.za. Members Usernames and passwords will be provided after receipt and allocation of a member's first contribution to the Fund.

Members can also download the GTC Administrator application from the Appstore for Apple® mobile devices and from Google Play for Android devices, to view their benefit details.

The web facility has been upgraded to provide members with other important information in addition to a benefit statement. A communication portal is now available on the web which will contain at least the following:

• Retirement calculator
• Member guides
• Monthly investment market updates
• The various claim forms

I declare that I have read and understood the content in this Form and I declare that the information recorded, by or on behalf of me, in this Form is true and correct.

Member signature _____   Date _____