

FOR OFFICE USE[illegible]

Taxpayer Details

Taxpayer reference no.									
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Year of Assessment ended on (CCYYMMDD)							
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[illegible][illegible][illegible]

Initials				
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Date of Birth (CCYYMMDD)

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[illegible][illegible]Passport Country / Country of Origin (e.g. South Africa = ZAF)

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If the taxpayer/member is not registered for income tax, select one of the following reasons: ☐ Unemployed ☐ Other ☐ Specify other

Annual income R

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Is the taxpayer a non-resident? Yes ☐ No ☐ Is the certificate of residency (citizenship certificate where DTA is not applicable) attached? Yes ☐ No ☐

Residential Address[illegible][illegible][illegible]**Postal Address**[illegible][illegible][illegible]

Particulars of Fund/Insurer

[illegible][illegible]

FSB Registration no.	1	2	/	8	/	0	0					/						
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Fund Approval no. (Public Sector Funds only)	1	8	2	0	4					
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FSB Registered Insurer no. **1 0 / 1 0 / 1 / 0 0**

[illegible][illegible]

Particulars of Fund/Insurer (continued)

PAYE Reference no.	7								
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[illegible]

Particulars of Gross Lump Sum Due	
1. Gross Lump Sum Due	
2. Less: Provision for Doubtful Debts	
3. Net Lump Sum Due	

Reason for directive:	Death Member / Former Member after Retirement	Par. (c) Living Annuity Commutation	Gn16: Existing Annuity	Death - Next Generation Annuitant	Next Generation Annuitant Commutation	Transfer of an annuity
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Date of accrual (CCYYMMDD)

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[illegible]

Full value of annuity R

[illegible][illegible][illegible]

Was any value of the annuity or retirement interest previously commuted for a single payment?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Member / Former Member benefit payable— Note: only applicable to reasons for directive: "Death – Member / Former Member after retirement", "GN16 Commutation" and "Par. (c) Living Annuity Commutation"	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Next Generation Annuitant benefit payable— Note: only applicable to reasons for directive "Next Generation Annuitant Commutation" or "Death – Next Generation Annuitant".

[illegible]

Particulars of transfer

Did the member elect to transfer to another insurer? Yes ☐ No ☐ If yes, state Insurer details below:

[illegible]

FSB Registered Insurer no. **1 0 / 1 0 / 1 / 0 0**

[illegible][illegible][illegible]

Particulars of transfer (continued)

State if the transfer/purchase of the annuities is subject to special conditions. If yes, confirm the applicable provision in the fund rules:

Particulars of pension/annuity purchase for a beneficiary/nominee

If death of member / annuitant, please indicate whether any portion of the total value of the annuity was used to purchase an annuity for a beneficiary/nominee: Yes ☐ No ☐ (If an annuity/pension was purchased from another insurer, state the details below:)

Surname																																
Name(s)																																
Identity number											Other Identity number																					
Annuity policy number											Amount utilised to purchase an annuity R											,										
Name of the registered long-term insurer where the annuity was purchased																																
E-mail address																																
FSB Registration no.	1 0 / 1 0 / 1 / 0 0										Tel no.											Cell no.										

Surname																																
Name(s)																																
Identity number											Other Identity number																					
Annuity policy number											Amount utilised to purchase an annuity R											,										
Name of the registered long-term insurer where the annuity was purchased																																
E-mail address																																
FSB Registration no.	1 0 / 1 0 / 1 / 0 0										Tel no.											Cell no.										

Particulars of pension/annuity purchase for a beneficiary/nominee (Continue)

Surname	<input type="text"/>																															
Name(s)	<input type="text"/>																															
Identity number	<input type="text"/>										Other Identity number	<input type="text"/>																				
Annuity policy number	<input type="text"/>										Amount utilised to purchase an annuity R	<input type="text"/>										,	<input type="text"/>									
Name of the registered long-term insurer where the annuity was purchased	<input type="text"/>																															
E-mail address	<input type="text"/>																															
FSB Registration no.	<input type="text" value="10 / 10 / 1 / 00"/>										Tel no.	<input type="text"/>										Cell no.	<input type="text"/>									
Surname	<input type="text"/>																															
Name(s)	<input type="text"/>																															
Identity number	<input type="text"/>										Other Identity number	<input type="text"/>																				
Annuity policy number	<input type="text"/>										Amount utilised to purchase an annuity R	<input type="text"/>										,	<input type="text"/>									
Name of the registered long-term insurer where the annuity was purchased	<input type="text"/>																															
E-mail address	<input type="text"/>																															
FSB Registration no.	<input type="text" value="10 / 10 / 1 / 00"/>										Tel no.	<input type="text"/>										Cell no.	<input type="text"/>									

Non Resident Service Rendered inside the Republic [Section 9(2)(l)]

Were any services rendered inside the Republic during the period of membership of the fund?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Total number of months services were rendered while contributing to fund	<input type="text"/>			
Total number of months services were rendered inside the Republic while contributing to fund	<input type="text"/>			
Total number of months services were rendered outside the Republic while contributing to fund	<input type="text"/>			

Declaration

I declare that the information furnished is true and correct in every respect.

Date (CCYYMMDD)

For enquiries go to www.sars.gov.za or call 0800 00 7277

FORM E

Version: v2017.00.06

FORM E - Tax Deduction Directive After Retirement and Death Annuity Commutations_2017.00.06

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Project: Directive Enhancements 2017/2018