

Relationship to client

BENEFICIARY NOMINATION FORM

Old Mutual Investment Services (Pty) Ltd
Mutualpark, Jan Smuts Drive, Pinelands 7405 = PO Box 207, Cape Town 8000.
Wealth: Tel 0860 999 199 = service@omwealth.co.za = www.omwealth.co.za
Unit Trusts: Tel: 0860 234 234 = retire@oldmutual.com = www.oldmutualinvest.com

Please complete this form and email to **service@omwealth.co.za** or **retire@oldmutual.com**. If there is not enough space on the form for all your beneficiaries, please make a photocopy of this form, complete and return together with the original form.

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Old Mutual Wealth Retirement Annuity Fund Old Mutual Wealth Preservation (Provident) Fund Old Mutual Wealth Preservation (Pension) Fund Old Mutual Preservation (Pension) IMPORTANT NOTES Legally, the trustees of the retirement funds will decide how the benefits will be allocated between your dependants and/or your nominated beneficiaries. The following persons are classified as your dependants: Your surviving spouse All your children, regardless of their age or whether they were adopted, from previous marriages, born out of wedlock or born after your death Persons inancially dependent on you or legally entitled to maintenance If a nominated beneficiary is a minor and unmarried, the benefit will be paid to your geneficiary is a minor and unmarried, the benefit will be paid to his/her legal guardian, legally recognised caregiver, trust or Beneficiary Fund. An estate can not be nominated as a beneficiary. However, if no nominated beneficiary or dependant is traced within 12 months of the Retirement Fund being notified of your death, the benefits will be paid into your estate. If no estate inventory has been reported to the Master of the High Court, the benefits will be paid into the Guardian's Fund. It is important that you complete this Beneficiary Nomination Form accurately and ensure that your beneficiaries are up to date, as this assists the trustees in allocating your benefits. Where no legal dependants exist, benefits shall be allocated to nominated beneficiaries. The trustees must carefully follow the law when allocating benefits, which is structured to ensure that anyone who was financially dependent on the deceased, is fairly considered. Please note that the trustees are not bound by this form add will consider a wide range of information in their allocation.																													
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4. PROTECTION OF YOUR PERSONAL INFORMATION

The Old Mutual Group would like to offer you ongoing financial services and may use your personal information to provide you with information about products or services that may be suitable to meet your financial needs. Please sms your ID number to 30994 if you would prefer not to receive such information and/or financial services.

We may use your information or obtain information about you for the following purposes:

Underwriting

Assessment and processing of claims

Credit searches and/or verification of personal information

Claims checks (ASISA Life & Claims Register)

Tracing beneficiaries

Fraud prevention and detection

Market research and statistical analysis

Audit & record keeping purposes

Compliance with legal & regulatory requirements

Verifying your identity

Sharing information with service providers we engage to process such information on our behalf or who render services to us. These service providers may be abroad, but we will not share your information with them unless we are satisfied that they have adequate security measures in place to protect your personal information.

You may access your personal information that we hold and may also request us to correct any errors or to delete this information. In certain cases you have the right to object to the processing of your personal information.

You also have the right to complain to the Information Regulator, whose contact details are:

http://www.justice.gov.za/inforeg/index.html

Tel: 012 406 4818 Fax: 086 500 3351

Email: inforeg@justice.gov.za

To view our full privacy notice and to exercise your preferences, please visit our website on www.oldmutual.co.za