

Satrix Retirement Plan Retirement notification

Important information

- Complete the form in block letters.
- Please mark the appropriate block(s) with an X.
- The request will only be processed if signed by the member or authorised person.
- Persons acting on behalf of a member must provide proof of appointment (power of attorney, letters of executorship, etc.). Only applicable if not already in Glacier's possession.
- The rules of the fund stipulate that you can retire at any time from the age of 55 years.

Send documents to

Glacier Financial Solutions
E-mail: satrixrp@glacier.co.za
Fax: 021 947 9210

Contact us for more information

- Phone our Client Contact Centre at: 0860 007 461
- Send an e-mail to: satrixrp@glacier.co.za

1. Contact details for further information

Name and surname: _____

Contact number: _____ E-mail: _____

2. Document checklist

Title: _____ Surname: _____

Full first names of member: _____

Income tax reference number /

Identity or passport number

E-mail: _____

3. Retirement options

The option that you select may have tax implications. We will request a tax directive from the South African Revenue Services (SARS) to indicate the tax amount to be withheld from any lump sum payment. To prevent any delays with your tax directive please ensure that your details and tax affairs are in order with SARS. Please note that once we have received the tax directive it cannot be cancelled.

Retirement Annuity

Existing investment number

Choose one of the following:

- Use the full retirement benefit to purchase a compulsory annuity from a registered insurer.
- Take one third as a cash lump sum and use the balance to purchase a compulsory annuity from a registered insurer.
- Take R (less than one third) as a cash lump sum and use the balance to purchase a compulsory annuity from a registered insurer.



