
CHECKLIST OF DOCUMENTATION REQUIRED FOR IN-SERVICE DEATH BENEFIT APPLICATION

REQUIREMENTS

The Fund administrators must be informed of the death as a matter of urgency either per telephone, fax or e-mail.

The Fund requires information pertaining to the following beneficiaries as well as the documents as stipulated.

DOCUMENTS REQUIRED

THE DECEASED:

- Certified copy of death certificate
- Copy of identity document
- Copies of divorce orders and agreements
- Police report in the event where the person died of unnatural causes
- Copy of medical aid card
- Copies of any relevant nomination forms on mine records
- Copy of last will if available
- Record of service (In service death only)

SPOUSE / LIFE PARTNERS:

- Completed application form
- Completed questionnaire
- Copy of identity document
- Copy of marriage certificate
- Completed income and expenditure form
- An original or certified copy of Bank statement containing personal and account details on the letter head/bank logo of the institution, stamped and signed by an authorized bank official. Please sign the bank statement.
- Application for Spouse Pension (PIC : In service Death only)

CUSTOMARILY LAW SPOUSES

- Completed application form
- Completed questionnaire
- Lobola certificate
- 3 affidavits from responsible persons confirming the customary law marriage
- Copy of Identity document
- Completed income and expenditure form
- An original or certified copy of Bank statement containing personal and account details on the letter head/bank logo of the institution, stamped and signed by an authorized bank official. Please sign the bank statement.

CO-HABITING PARTNERS

- Completed application form
- Completed questionnaire
- Copy of identity document
- 3 Affidavits from responsible persons confirming the duration of co-habiting relationship and the extent of dependency on the deceased
- Any other form of proof like photo's, birthday cards etc.

- Income and expenditure form
- An original or certified copy of Bank statement containing personal and account details on the letter head/bank logo of the institution, stamped and signed by an authorized bank official. Please sign the bank statement.

MINOR CHILDREN (INCLUDES LEGALY ADOPTED CHILDREN)

- Copy of birth certificates/identity documents
- If child was born illegitimately 3 affidavits from responsible persons confirming the deceased's paternity of the child
- Adoption order if applicable
- An original or certified copy of Bank statement containing personal and account details on the letter head/bank logo of the institution, stamped and signed by an authorized bank official. Please sign the bank statement.

MAJOR CHILDREN (INCLUDES LEGALY ADOPTED CHILDREN)

- Completed application form
- Completed questionnaire
- Copy of identity document/birth certificates
- Adoption order if applicable
- Income and expenditure form
- An original or certified copy of Bank statement containing personal and account details on the letter head/bank logo of the institution, stamped and signed by an authorized bank official. Please sign the bank statement.
- Equal split letter if only majors are applying
- Affidavit confirming that the deceased never remarried or was in a cohabiting relationship or had any financial dependants after his spouse died (only if major children are applying)

OTHER DEPENDANTS (FACTUAL DEPENDANTS)

- The dependants include any other person, who is not a legal dependant, who was partially or fully dependant on the deceased at the time of death. (i.e. Step children, Parents, Nieces, Nephews, Siblings etc.)
- Completed application forms
- Completed questionnaire
- Copy of Identity document
- 3 affidavits confirming the nature, extent and duration of the dependency
- Relevant documentary proof (e.g. Bank statements etc.)
- Income and expenditure form
- An original or certified copy of Bank statement containing personal and account details on the letter head/bank logo of the institution, stamped and signed by an authorized bank official. Please sign the bank statement.

FUTURE LEGAL DEPENDANTS

- A person whom the member would have become legally liable for maintenance had he not died. (e.g. posthumous child, fiancé)
- Proof of engagement e.g. purchase of ring , invitations, etc.

ESTATE PAYMENTS

- A benefit will become payable to the estate twelve months after the date of death if the deceased is not survived by any dependants or nominees and the following documents will be required.
- Completed application form by Executor of estate
- Certified copy of Letter of Executorship
- Letter confirming that the deceased is not survived by any dependants
- Estate Bank details
- Solvency letter