

## **Instructions for Completing Form Z864: Updating the Personal Particulars of a Member or Pensioner of a Pension Fund Administrated by the Pensions Administration**

1. This form notifies the Pensions Administration of any changes to the particulars of
  - A Member,
  - A Pensioner or
  - Dependants of a Member or Pensioner (Spouse, Life Partner or Minor Child).
2. The Personal Particulars and Declaration sections of the form must be completed in all cases. The other sections of the form are optional. They need to be completed if the Pensions Administration does not have the latest relevant data.
3. If any particulars of the member change, it is the responsibility of firstly the member and secondly the employer to notify the Pensions Administration.
4. This application form requires at least the following attachments:
  - A certified copy of an ID (preferably barcoded) or passport of the Member (certified within the last six (6) months).
  - If the Member's Marital Status is "Married" to a Spouse (Not Life Partner): A certified copy of the marriage certificate: - Religious, Customary Union or Civil as issued by Home Affairs. Alternatively, a certified copy of a Customary Union Certificate, Hindu Certificate or "Lobola" Affidavit. The affidavit should contain the names of both parties, names of family members of both parties, ID numbers of both parties, statement of marriage, date of marriage, place of marriage and registration number (if available).
  - If the Member's Marital Status is "Life Partner": Affidavits by the member and his or her partner, setting out the nature of the relationship, and supporting evidence (preferably with supporting documentation), of that relationship; or
  - One or more of the following affidavits, setting out the nature of the relationship, and indicators, (preferably with supporting documentation), of that relationship:
    - A member of each party's family;
    - A joint friend; and/or
    - An authorised member of any organisation, institution or society of which one or both parties has been a member.
  - If any minor child is registered (biological or adopted), a certified copy of the Birth Certificate. For a major child and other person that is financially dependent on the member, a certified copy of the person's identity document/passport and proof of financial dependency if applicable.
  - Optional: an original copy of a Nomination of Beneficiaries Form - WP1002 if no such form has previously been submitted to the Pensions Administration, or the member's preferred nominees have changed.