

Notice to Old Mutual of Transfer of Ownership (Cession)

Licensed Financial Services Provider

Please print in block letters using black or blue ink.

INSTRUCTIONS AND REQUIREMENTS

- 1. The cession notice must be completed in duplicate in pen.
- 2. One of them to be submitted to Old Mutual. One to be attached to the original policy contract.
- 3. The cession notice must be signed and dated by the cedent and cessionary (please note that the cedent must sign in the presence of an independent Commissioner of Oaths and must, where necessary, complete the capacity in which he/she signs).
- 4. If the spouse's consent is required, the cedent's husband/wife must sign the cession notice.
- 5. A cession agreement should comply with all legislation, including the Income Tax Act.
- 6. The applicable reason for the cession must be completed (examples listed below).
- 7. If the cedent or cessionary is a non-natural person, complete the full name and registration number under "Title" and the authorised signatory's details thereafter.

Reason	Additional requirements											
a. Free gift												
 Free gift with reversion to me should the cessionary predecease me 												
c. Free gift with reversion to me should the cessionary predecease me or our marriage dissolve by divorce												
d. Value received/Sale of policy	d. Refer to Branchnet at local Old Mutual Branch											
e. Antenuptial contract	e. Copy of antenuptial contract											
f. Partnership	f. Copy of partnership/buy-and-sell agreement											
g. Partnership dissolved	g. All ex-partners must sign cession form											
h. Divorce agreement	h. Certified copy of divorce agreement and court order											
i. Deceased estate	i. Certified copy of letters of executorship or authority											
j. Subject to usufruct in will	j. Copy of letter of executorship and will from the Master											
k. Tax-exempt institutions	k. SARS certificate for tax-exempt institutions											
I. Specify other reason												

CHECKLIST:

In regard to all of the above reasons, the following requirements may be applicable and should be submitted to Old Mutual with the cession notice:

- Cancellation of existing stop/debit order and implementation of new stop/debit order details
- Request for addition of life assureds
- Notice of appointment of new beneficiaries
- Instructions regarding any required policy change, e.g. extension of term
- For cession of policies in a capacity other than owner, the applicable proof of authorisation to sign the cession notice (Examples: company-owned policies, deceased estates, trusts, insolvent estates.)
- Acknowledgement of debt by cessionary if there is a loan on the policy
- Consent of the security cessionary to cede the policy held as security. If the cedent is a security cessionary: a copy of the security cession authorising them to alienate the policy and proof that section 44 of the Long-Term Insurance Act has been complied with.
- Application for a duplicate policy
- Details of the servicing agent of the cession

For value received/sale of policy:

- Affidavit by buyer and seller
- Certified copy of the buyer's ID document
- Administration cost recovery payment

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Licensed Financial Services Provide

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Identity number																										_
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female policyholder																	ie poli	Cy IS II	00 011	nei iii	e or u	iat oi	i iiei	Husbe	iliu. I	
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Surname/Trust/ Company name																										
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Natural person		(Corpo	orate		*Ta	ax-ex	empt	institu	ution																
* IMPORTANT NOTE: Investments status. Old Mutual reserves the r	ight to	o, hold	l an ir	nvestm	ent in	, or to	move	it to,	an app	propria	ate taxed	d po	olicyho	able to	satis fund, a	fy Old and, w	Mutua here i	al, bey necess	ond a ary, to	II reas o adju	onable st the	e dou value	ıbt, o e of	of its to the un	ax-ex derly	em ing
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Signature of new owner												С	apaci	ty												
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CERTIFIED BY COMMISSIONER OF OATHS

I certify that the cedent acknowledged that he/she understands that he/she and his/her beneficiaries will no longer be entitled to benefits from this policy and that by signing this document he/she has instructed Old Mutual to note the transfer of ownership of this policy. The deponent produced his/her ID document and I certify that the deponent is indeed the same person as indicated in the ID document.

Signed and sworn to before i	me at																								
on this day	of 20																								
Commissioner of Oaths (full names)												Official stamp of Commissioner of Oaths													
Signature of Commissioner of	f Oatl	ns																							
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Surname/Company name																									
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Note If you transfer your account at any time, please advise Old Mutual immediately to enable us to update our records. Also provide your new account number. Our telephone number at the Client Servicing Centre is 0860 50 60 70.

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