

# PRUDENTIAL INCOME PORTFOLIOS LIVING ANNUITY CHANGE IN BENEFICIARY FORM



Prudential Investment Managers (South Africa) (Pty) Ltd (Registration number: 2013/051515/07), a registered Financial Services provider, performs the asset management on behalf of Prudential Portfolio Managers (South Africa) Life Ltd (Registration Number: 2008/013338/06).

## Our contact details

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## Investor details

Existing investor number:

Title:  Surname:

First names:

SA ID number:  Date of birth:

## Legal guardian details (if applicable)

Existing investor number:

Title:  Surname:

First names:

SA ID number:  Date of birth:

## Declaration

I the undersigned,  (Investor's name), warrant that I am legally entitled and empowered to vary the beneficiary(ies) nominated on the above investment product and revoke any and all beneficiary nominations previously made in respect of the investment product. I direct that, subject to the terms and conditions and any other applicable legislation, the person/s nominated in this document shall be the beneficiary(ies) of the investment product.

## Nominated beneficiary

1. If you appoint more than one beneficiary, please show the share per beneficiary.
2. To nominate more than 4 beneficiaries, please attach a separate sheet with the details.
3. In the event that a minor does not hold an identity document, kindly provide the date of birth. Please also indicate the legal guardian of the minor.
4. In the event that you have selected a Living Annuity, payment to beneficiaries nominated will be made in terms of the Pension Funds Act.
5. In the event that you have selected a voluntary investment, payment will be made according to the Executor of the Estate.
6. Should there be no surviving beneficiary at the date of your death, proceeds of the policy shall be paid to the estate.

Investor initial  Financial adviser initial

## Beneficiary nomination

	Beneficiary	Beneficiary	Beneficiary
Surname:	<input type="text"/>	<input type="text"/>	<input type="text"/>
First names:	<input type="text"/>	<input type="text"/>	<input type="text"/>
ID number:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Country of residence:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Passport number if no SA ID number:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Passport country of issue:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Passport expiry:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Country of tax residence:	<input type="text"/>	<input type="text"/>	<input type="text"/>
SA tax number:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other country's tax number:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Relationship:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Share:	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Legal guardian (if applicable)	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Removal of beneficiary details

Surname	First name	ID number	Relationship
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

If you are married in community of property, and want to nominate a beneficiary other than only your spouse, you would need your spouse's signature.

Full name of spouse:	<input type="text"/>	Signature of spouse:	<input type="text"/>
<input type="text"/>		Capacity	<input type="text"/>
Full name of investor or person authorised to sign on behalf of the investor	<input type="text"/>		
Signature of investor or person authorised to sign on behalf of the investor	<input type="text"/>	Date	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Investor initial  Financial adviser initial