

Tax directive simulation request

- Use this form to request a tax directive simulation for a withdrawal from a Retirement Annuity Fund, Pension Preservation Fund, Preservation Provident Fund, or Equity Linked Living Annuity.
- Note that the tax directive simulation is not a final directive and tax amounts shown on the simulation may differ from those shown on the final directive from SARS.
- Send the completed form to instructions@psg.co.za.
- If you need assistance, please contact your financial adviser or one of our client service consultants on 0860 774 774 or at clientservice@psg.co.za.

Investor details

Name and surname/Name of company or trust	<input type="text"/>
ID/Passport number/Registration number	<input type="text"/>
Investment number/s	<input type="text"/>

Withdrawal type

What type of withdrawal would you like this tax simulation for?

☐ Full withdrawal ☐ Part withdrawal ☐ Retirement

If you are only requesting the tax simulation for a part withdrawal, please indicate the amount R

Tax details

SA income tax number

If you are you invested in the Government Employees Pension Fund or another public sector fund you must complete the following section:

Pensionable service start date

Number of completed years of membership before 1 March 1998

Total number of completed years membership

If you have made any excess contributions to a retirement fund which were not deductible for tax purposes in a specific year you must complete this section:

Total excess contributions made to a provident fund before 1 March 2016

Total excess contributions made to all retirement funds before and after 1 March 2016 (excluding contributions made above)



Requesting a tax directive simulation for withdrawing a pension interest in terms of a divorce order

If you are requesting a tax directive simulation for a withdrawal of pension interest in terms of a divorce order, you must complete this section:

This section must be completed by the spouse who is not the member:

First names and surname

ID/Passport number

South African income tax number

Contact details

Physical address: Building 1, The Ingress, Corner of Magwa and Lone Creek Crescents, Waterfall City, Waterfall, 2090, Gauteng, South Africa

Postal address: PO Box 61295, Marshalltown, 2107, South Africa

Sharecall: 0860 774 774

Email: clientservice@psg.co.za

Website: www.psg.co.za