

## Request for a Tax Deduction Directive Pension and Provident Funds on Retirement/Death before Retirement

**FORM A&D** 

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Application no.	
<b>Taxpayer</b> Details	
Taxpayer ref no.	Year of Assessment ended on (CCYYMMDD)
Surname	
First Name	
Other Name	
Initials	Date of Birth (CCYYMMDD) ID No.
Other Identification	Specify other identification
If the taxpayer/member is not registered f	for income tax, select one of the following reasons:  Unemployed  Other  If other, Specify
Annual income R	Employee no.
Is the taxpayer a non-resident? Yes	No No
Residential Address	
	Postal Code Postal Code
Postal Address	
	Postal Code Postal Code

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	icate whether this fund is A public sector fund An approved fund Other, specify Specify Specify  articulars of Gross Lump Sum Due																												<u> </u>					$\perp$				$\perp$							_										
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Date From (CCYYMI	m MDD)									Da (Co	ite To CYYN	) MMDE	))									=			Co	omple	eted y	ears																											
If no, provide the	e peri	od of r	nemb	ership	of this	fund	d durin	ng wh	ich c	ontrib	oution	ns wei	re ma	ide:			_			_																																			
Date From (CCYYMI	m MDD)									Da (Co	ite To CYYN	) MMD[	0)									=			Co	omple	eted y	ears	;																										

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Particulars of Gross Lump Sum Due (continued)	
Did the fund purchase an annuity?	Yes No
If yes, State the amount utilised to purchase a local annuity / annuities	R
Name of the registered long-term insurer where the annuity was purchased:	
Annuity policy number	
If yes, State the amount utilised to purchase a foreign annuity / annuities	R
f no, is the fund paying the annuity?	Yes No
If yes, the amount remaining in the fund to fund the annuity	R , ,
Service Rendered Outside the Republic	
Were any services rendered outside the Republic during the period of membership of the fund?	Yes No
Total number of months services were rendered while contributing to fund	
Total number of months services were rendered outside the Republic while contributing to fund	
Period of Employment in Public Sector Fund (Only applicable where a benefit was paid into	the current fund from a public sector fund)
Date From CCYYMMDD) Date To (CCYYMMDD) = Completed years	
Amount transferred or the amount attributed to the period of membership in the public sector fund	R , , ,
Date the amount was transferred from public sector fund (CCYYMMDD)	
Details of salary earned (only applicable for date of accruals prior to 1 October 2007)	
Highest average salary earned by the taxpayer during any 5 consecutive years in the service of the employer during his membership of the fund:  Date To Salary  Salary	
Date From (CCYYMMDD) Date To Salary  Date From Date To Salary	R , , , ,
(CCYYMMDD) (CCYYMMDD) Salialy	R , , ,
Date From (CCYYMMDD) Date To (CCYYMMDD) Salary	R
Date From (CCYYMMDD) Date To (CCYYMMDD) Salary	R , , ,
Date From (CCYYMMDD) Date To (CCYYMMDD) Salary	R
Total	R
Average for 5 years or lesser period if employee employed for lesser period	R , , , ,
On death: The member's salary during 12 months immediately preceding death	R
Note: Salary includes any amount received or receivable annually under a contract of service including cost of living allowances, commission, shares of profits, etc., but n	of occasional bonuses or fees which were dependant on the whim of directors or employer

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Particulars of employer (only applicable for date of accruals prior to 1 October 2007)																																									
Name of Employer																																									
PAYE ref no.	[	7																																							
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Surname																																									
Initials	Ī				Ī		7	Te	eleph	none	no.				Ī																										
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I declare that the information furnished is true and correct in every respect.																								ate (	CCY'	YMM	DD)							For en	quiries call 080	go to v 00 00 S	ww.sa SARS (	rs.gov. 7277)	za or		

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