

MEMBER INFORMATION AND BENEFICIARY FORM

SAMHS FUND Telephone number: +27 (0) 12 664 8459

SAMHS E-mail address: info@samhsfund.co.za

A. DETAILS OF MAIN MEMBER

Full name													
Surname									Force Number:				
Identity number													
Gender	Male	Female	Age		Marital status								
Cell number					Tel number								
Nationality					Country of Birth								
Email address													
Physical address											Postal code		
Postal address											Postal code		

B. INFORMATION OF SPOUSE

Surname												
Full name												
Identity number												
Gender	Male	Female	Age									
Tel number					Cell number							
Email address												

C. NOMINATED BENEFICIARY (100%) (THE PERSON WHO WILL RECEIVE THE BENEFIT PAYMENTS)

Surname												
Full name												
Identity number												
Gender	Male	Female	Age		Relationship							
Tel number					Cell number							
Email address												

I, the applicant/policyholder under this policy, hereby nominate the above-mentioned person, as the beneficiary in terms of this policy, to receive all benefits payable under this policy upon my death. I hereby indemnify Guardrisk Life Limited against any claim by myself or my relatives/estate in respect of the payment of the policy benefits to the nominated beneficiary.

D. DECLARATION IN RESPECT OF LIFE INSURANCE PRODUCTS

I hereby apply for the SAMHS "GROUP" Funeral Plan in accordance with the conditions and exclusions of the plan as set out in the quotation and policy document. I understand that a policy summary, including my personal details, chosen benefits and claims procedures (as intended in section 48 of the Long-Term Insurance Act) will be emailed or posted to me. In accordance with Rule 4 of the Policyholder Protection Rules, I have 31 days from receipt of section 48 summary to cancel this policy. If this policy is cancelled within 31 days, any payment that has been paid will be refunded provided no claim has been lodged or any benefit paid. I am aware of the waiting period for natural death and suicide applicable to the policy. I have familiarised myself with the maximum cover for each member of the Family Funeral Plan. There is a limit of 1 policy per dependant family of the SAMHS "GROUP" members.

I, the undersigned, hereby declare and warrant that all information supplied herein is true and complete. I am aware and understand that any non-disclosure or misrepresentation of information, which is material to the determination of the risk by Guardrisk Life Limited, may lead to the policy being declared null and void, in which case all premiums paid will be forfeited. I am certain that the product for which I am applying meets my needs and feel that I have all the necessary information in order to make an informed decision in respect of the purchase thereof. This funeral policy shall come into force and effect on the inception date, provided that the offer for insurance made by the policyholder by way of the proposal form is unconditionally accepted by Guardrisk Life Limited and the first premium payable in terms of the policy was received by Guardrisk Life Limited.

E. DECLARATION IN RESPECT OF THE PROTECTION OF PERSONAL INFORMATION ACT

Processing of Personal Information in terms of the Protection of Personal Information Act 4 of 2013.

Your privacy is of utmost importance to Us. We will take the necessary measures to ensure that all information provided by you or which is collected from you is processed in accordance with the provisions of the Protection of Personal Information Act 4 of 2013 and further, is stored in a safe and secure manner.

You hereby agree to give honest, accurate and up-to-date Personal Information and to maintain and update such information when necessary. You accept that your Personal Information collected by Us may be used for the following reasons:

- to establish and verify your identity in terms of the Applicable Laws;
- to enable Us to fulfil our obligations in terms of this Policy;
- to enable Us to take the necessary measures to prevent any suspicious or fraudulent activity in terms of the Applicable Laws; and
- reporting to the relevant Regulatory Authority/Body, in terms of the Applicable Laws.

Unless consented to by yourself, we will not sell, exchange, transfer, rent or otherwise make available your Personal Information (such as your name, address, email address, telephone or fax number) to any other parties and you indemnify Us from any claims resulting from disclosures made with your consent.

You understand that if the Administrator/Insurer has utilized your Personal Information contrary to the Applicable Laws, you have the right to lodge a complaint with Guardrisk or with

Initials

the Information Regulator once established.

F. ANTI-MONEY LAUNDERING PROVISIONS AND INFLUENTIAL PERSONS DECLARATION

The Financial Intelligence Centre Act (FICA) requires that we know if you are an influential person as explained in the Act. It differentiates between a politically exposed person, domestic prominent influential person, foreign prominent public official and a known close associate or family of domestic prominent influential persons and foreign prominent public officials. More than one of the definitions can apply to the same person. Read the explanations at the end of this form, indicate which explanations apply to you and give your reason.

<input type="checkbox"/>	Politically exposed person	
<input type="checkbox"/>	Domestic prominent influential person	
<input type="checkbox"/>	Foreign prominent public official	
<input type="checkbox"/>	Known close associate	
<input type="checkbox"/>	Family member	

Definitions of influential persons

- **A Politically exposed person** is someone who is or has been entrusted with prominent public functions, based on a specific political affiliation. **Examples:** A head of state, cabinet minister, member of parliament/local/provincial government, senior administrator in government department (financial department/tender processes), senior judge, manager of local municipalities who award tenders, senior and/or influential official, ambassador/high commissioner, senior representative of a religious organization, leader of a political party, accounting officer of a national or provincial department, municipal manager, officer of SANDF.
- **A Prominent influential person** refers to any individual who holds, or has at any time in the preceding 12 months, the position of chairperson of a board of directors, chairperson of an audit committee, executive officer, or chief financial officer of a company as defined in the Companies Act 71 of 2008, if the company provides goods or services to an organ of state.
- **A Foreign politically exposed person** refers to any individual who holds, or has held a position in any foreign country of a prominent public function including that of a head of state, member of a foreign royal family, government minister or leader of a political party, senior judicial official, senior executive of a state-owned corporation or a high-ranking member of the military.
- **A known close associate** is an individual who is closely connected to a prominent person, either socially or professionally. The term “close associate” is not intended to capture every person who has been associated with a prominent person.
Examples: Known relationships outside the family unit (e.g. girlfriends, boyfriends, mistresses), a prominent member of the same political party, civil organisation, labour or employee union as the prominent person, business partner or associate, especially one who shares (beneficial) ownership of corporate vehicles with the prominent person, or who is otherwise connected (e.g. through joint membership of a company board), any individual who has sole beneficial ownership of a corporate vehicle set up for the actual benefit of the prominent person.
- **A family member** is an individual who is related to a PEP/PIP either directly (consanguinity) or through marriage or similar (civil) forms of partnership. **Examples:** Spouse or civil/life partner, previous spouse or civil/life partner, children and stepchildren and their spouses or civil/life partners, parents, siblings and stepsiblings and their spouses or civil/life partners.

Member Signature:	Date:	D	D	M	M	Y	Y	Y	Y
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Siyavika is an Authorised Financial Services Provider FSP 44999
Guardrisk Life Limited is an Authorised Financial Services Provider, FSP 76 and a licensed life insurer.