



For your claims to be processed quickly, please ensure that:

- All standard requirements and supporting documents have been submitted in line with the table below.
- The appropriate form(s) must be fully completed and signed by **both you and your employer**.
 - The completed and signed form(s) serve as written instruction to the Fund (Administrator) on your choice/election, i.e. what must be done with your benefit.
 - Your employer needs to confirm when your last contributions to the Fund were deducted. For withdrawing members, they also confirm that you are exiting employment, as this benefit cannot be paid whilst you remain employed.
- Your banking details reflect an **account that is in your name**.
- Your SARS tax affairs are up to date and **no outstanding amounts** are owed by you.

The following table details the requirements for various types of claims.

Documentation Requirement	Withdrawal Claim	Retirement Claim
Claim notification form	Preservation of benefit/ Withdrawal notification	Retirement notification
Copy of proof of age of the member: <ul style="list-style-type: none"> • Identity document; OR • Passport for non-South African citizens 	X	X
Bank details of the member: <ul style="list-style-type: none"> • Full bank details – name of account holder, name of bank, branch, account number, account type • Where the name of the account holder differs due to marriage, then a certified copy of a marriage certificate must be provided, or a divorce decree or proof of surname change from Home Affairs – whichever is applicable 	X	X

Documentation Requirement	Withdrawal Claim	Retirement Claim
<p>Transfer details (if applicable)</p> <p>Transferring to another policy:</p> <ul style="list-style-type: none"> Copy of transferring policy application form with policy number Insurer's bank details <p>Transferring to another employer's retirement fund:</p> <ul style="list-style-type: none"> Fund's name and FSCA Pension Fund (PF) number Insurer's name Fund's bank details 	X	X
<p>Foreign exchange control form (if applicable):</p> <ul style="list-style-type: none"> This is required for members residing overseas A bank draft will be completed 	X	X
<p>Unsettled Divorce orders or Maintenance orders (if applicable)</p> <p>For any applicable prior claims against the fund in respect of the member, that have not already been settled:</p> <ul style="list-style-type: none"> Copy of the divorce degree and settlement arrangement Copy of the final maintenance order 	X	X
<p>Retirement annuity detail (if applicable):</p> <ul style="list-style-type: none"> Retirement annuity policy details with policy number Insurer's bank details 		X



Only once Liberty Corporate (the Fund's Administrator) has received your claim, along with all supporting documentation, will the processing of the claim commence.

Please ensure that you have provided the Fund's Administrator with your latest contact details (on your claim form) so that they can keep in touch with you during the claim process.

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