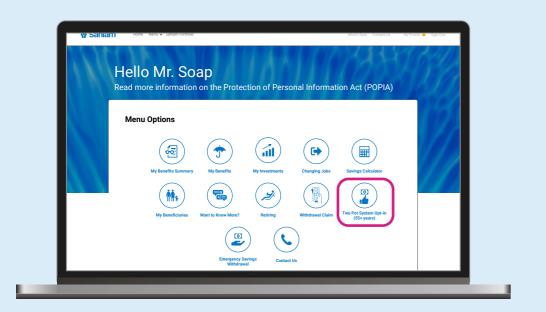
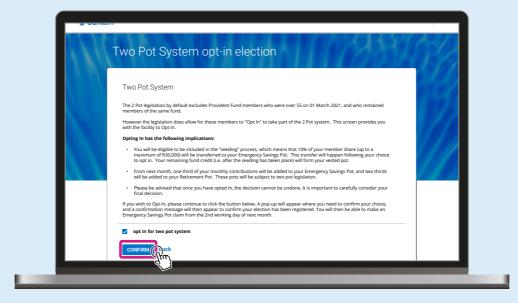
55+ Provident fund members Opt-In and Emergency Savings Pot withdrawal process

Eligible Members 55+ Opt-In process

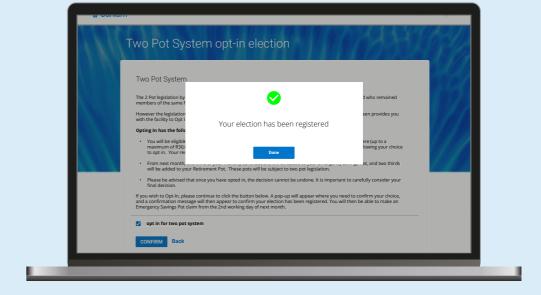
The draft legislation proposed an opt-in window for eligible members from 1 September 2024 to 1 September 2025 to join the two-pot retirement system. It is advisable that members who wish to opt-in do so within this window period.



The **Opt-In icon** will only appear in the **Menu Options** of eligible members aged 55 years and older as of 1 March 2021.

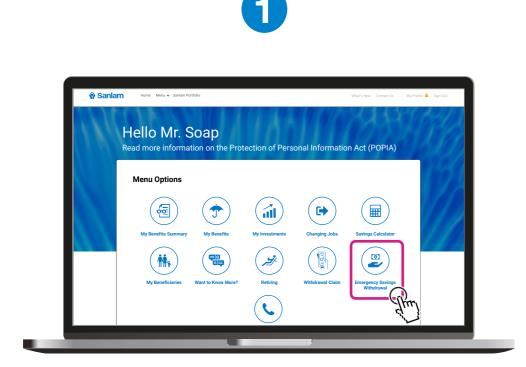


Once you have selected the **opt-in check box** and clicked on the **CONFIRM button**, the following message will appear.



Note: Once the member has elected to opt-in the Opt-In icon will no longer appear in the Menu Options as opting-in cannot be undone.

Emergency Savings Pot withdrawal process

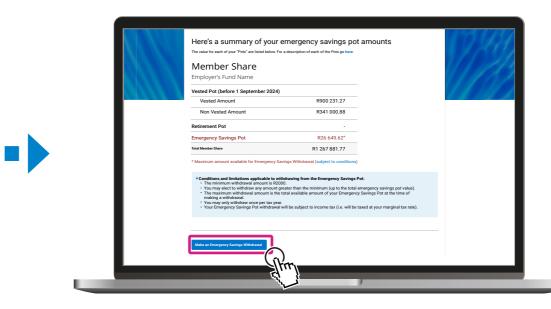


To make a withdrawal, click on the **Emergency Savings Withdrawal**

Pre-retirement withdrawals Preserve your funds and retire with confidence.	
Legislation permits you to make a partial withdrawal from your pension fund while you are still employed, accon imitations. We encourage you to peruse the information below to get an understanding of how this works, and t use of this option.	ling to certain rules and he impacts of making
Overview	~
Emergency Savings withdrawal	~
Retirement Pot	~
Vested Pot	~

To see the balance in your Emergency Savings Pot, click on **Review my Emergency Savings Pot**.

3

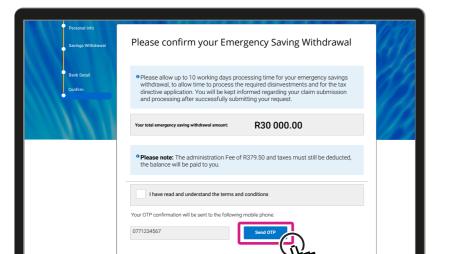


2

These are the balances in each of your pots. If you have more than R2 000 in your Emergency Savings Pot, you can make a savings withdrawal. Click on Make an Emergency Savings Withdrawal.



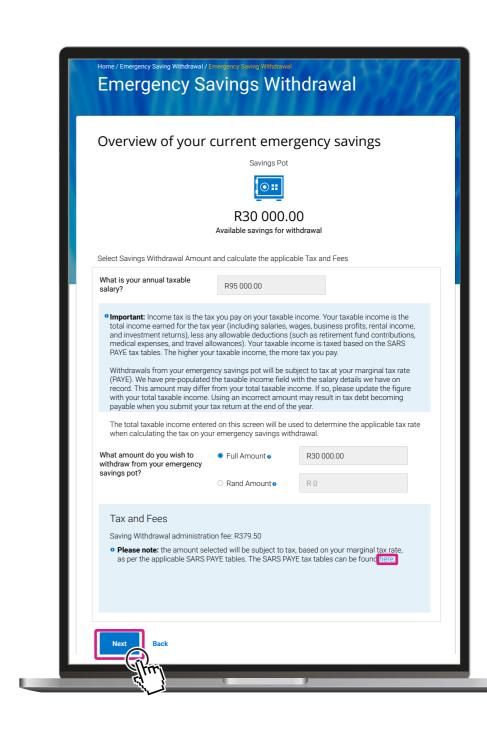
This shows that your contact and bank details have been validated. Click Next.



	Emergency Saving		
Personal Info	Please check your deta	ils before proceeding	
	joe.soap@employer.com	0771234567	
Bank Detail	Income Tax Number		
Confirm	1234597890 Please note: A tax reference number is a compulsory requirement of SARS. We will not be able to process any claim paymems without a valid tax reference number.	9102315001081	
	Are you a SA citizen or resident?	Yes	•
		O No	
	I would like to verify my	Email	
	emergency savings withdrawal via:	○ SMS	

Check your details on the screen. Confirm if you're a SA citizen or resident and if you want to verify your savings withdrawal via email or SMS.

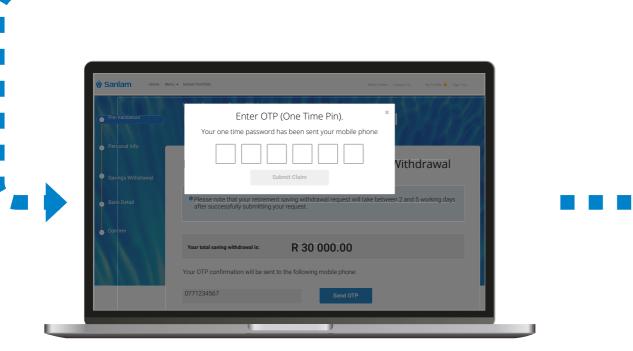






Please be advised that processing may take up to 10 working days after we completed your seeding process and received a successful tax directive within 2 working days from date of application.

Click on **Send OTP**.



Enter the OTP that you have received via your choice of either email or SMS.

www.sanlam.com

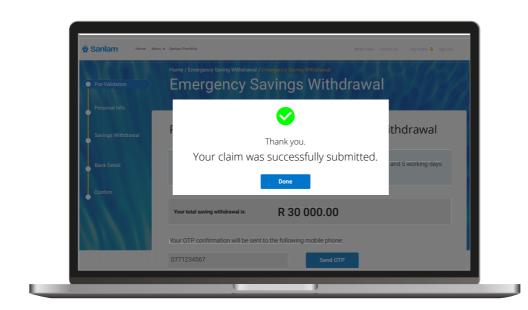
Your banking details are inserted by your employer. If your bank details are correct, click **Next**. Should they need updating please contact your HR. Indicate the amount you want to withdraw. This can be the full amount available or enter a Rand amount. Click on the **SARS Tax Tables** for the applicable tax rate that may apply to you.

If you need help, please contact SC Client Care on: SCClientCare@sanlam.co.za or send a WhatsApp or call: 0861 223 646 from 8am - 5pm Monday to Friday excluding public holidays

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If the OTP is correct, you will get confirmation that your claim was successfully submitted.