



## Spouse's or Orphan's Pension - Z143

#	Forms and Attachments Required Refer to the rules of the GEP Act: <ul style="list-style-type: none"><li>• A Spouse or Life Partner can apply for pension upon the death of a member or pensioner</li><li>• A separate application form needs to be submitted by each applicant or dependant applying for spouses pension</li></ul>	Type of Applicant	
		ORPHAN'S PENSION	SPOUSE'S PENSION
	<b>Tick type of transaction and missing attachment(s) ►</b>		
1.	Duly completed <b>Spouse's or Orphan's Pension Form (Z143)</b> . A separate application form is needed for each spouse and/or guardian for a set of orphans.	Attached	Attached
		Missing Data	Missing Data
2.	An <b>certified copy</b> of the <b>Death Certificate</b> (Issued by the Department of Home Affairs)	Attached	Attached
		Missing	Missing
3.	A <b>copy</b> of the <b>deceased</b> member's <b>ID</b> (preferably bar-coded) or <b>Passport</b> .	Attached	Attached
		Missing	Missing
4.	An originally <b>certified copy</b> of an <b>ID</b> (must be bar-coded) or <b>Passport</b> of the <b>applicant</b> – exceptions as per ID Policy.	Attached	Attached
		Missing	Missing
5.	A copy of the <b>Nomination of Beneficiaries Form (WP1002)</b> and / or an originally <b>certified copy</b> of member's / pensioner's <b>last will and testament</b> , where available.	Attached	Attached
		Missing	Missing
		N/A	N/A
6.	<b>Conditional:</b> For when the <b>surname</b> of the person is different to the surname on the <b>ID, Passport or Death Certificate</b> documents, an originally certified copy of a letter from the Department of Home Affairs or Full Birth Certificate of a child is required to confirm the surname.	Attached	Attached
		Missing	Missing
		N/A	N/A
7.	Duly completed <b>ACB Bank Particulars Form (Z894)</b> for each spouse, guardian for a set of orphans, eligible child over 18 years or the Estate/Trust.	Attached	Attached
		Missing	Missing
8.	<b>Conditional:</b> For any <b>possible dependants</b> (current marriage or previous marriage) (natural or adopted), an originally <b>certified copy</b> of the <b>Full Birth Certificate</b> or <b>ID</b> (must be bar-coded). Benefits will be paid to the Master of the High Court for children under the age of 18 years.	Attached	
		Missing	
		N/A	
9.	<b>Conditional:</b> If a <b>full time student</b> is applicable and over 18 years but less than 22 years, <b>proof of registration</b> is required from the institution. If the child is <b>disabled</b> and over 18, <b>medical proof of the disability</b> and of <b>financial dependency</b> on member/spouse is required through an <b>affidavit</b> that states the: amount of financial dependency and personal income of person concerned.	Attached	
		Missing	
		N/A	
10.	<b>Conditional:</b> If an <b>adopted child</b> is applicable, an originally <b>certified copy</b> of a <b>Legal Adoption Certificate</b> (Issued by the Department of Home Affairs) is required upon which the names of the adopted parents appear.	Attached	
		Missing	
		N/A	

11.	<b>Conditional:</b> For <b>children</b> in the care of a <b>guardian</b> (from current or previous marriage) (natural or adopted), an originally certified copy of a <b>will / testament</b> or <b>court order</b> from the <b>High Court</b> or the <b>Children’s Court</b> that indicates the appointment as guardian over the children is required.	Attached	
		Missing	
		N/A	
12.	<b>Conditional:</b> If the <b>spouse</b> of the deceased contributing member or pensioner is applying for spouse’s pension, an originally <b>certified copy</b> of the <b>Marriage Certificate</b> is required or alternatively the required <b>affidavit(s)</b> for consideration. For a <b>Life Partnership: affidavits</b> setting out the nature of the relationship, and indicators, (preferably with supporting documentation), of that relationship from a member of each party's family, a joint friend and/or an authorised member of any organisation, institution or society of which one or both parties has been a member.		Attached
			Missing
			N/A
13.	<b>Conditional:</b> Where the member / deceased member had a <b>previous marriage</b> , an originally certified copy of the former spouse’s <b>ID</b> (must be bar-coded) or <b>Passport, Marriage Certificate, Death Certificate, Settlement Agreement</b> and/or <b>Decree of Divorce</b> are needed. Where payments are due to an ex-spouse, an <b>ACB Bank Particulars Form (Z894)</b> is needed. Divorce Settlement Agreements for the division of pension interest <b>are only effective from 1 August 1989 as per the amendment to the Divorce Act*</b> and a separate <b>Withdrawal from Fund Form (Z102)</b> completed by the employer is needed.		Attached
			Missing
			N/A
14.	<b>Conditional:</b> In order to establish dependency an <b>originally certified</b> copy of a <b>Court Order</b> in respect of maintenance payable is required.		Attached
			Missing
			N/A
15.	<b>Conditional:</b> If the benefit is payable to the <b>Estate</b> , an <b>originally certified</b> copy of the <b>Letter of Executorship</b> is required.	Attached	Attached
		Missing	Missing
		N/A	N/A
16.	An <b>originally certified</b> copy of the previous medical scheme <b>Membership Certificate</b> of the deceased member and new medical scheme <b>Membership Certificate</b> for the spouse that is registered as the main medical scheme member.	Attached	Attached
		Missing	Missing
		N/A	N/A
<b>FOR GEPF OFFICE USE ONLY</b>			
<b>Member/Pensioner Number:</b>			
<b>Pre-Audited By</b>		<b>Checked By</b>	

\* In 1989 the Divorce Act was amended to provide for the definition of pension interest in respect of pension- and retirement funds. Accordingly a portion of the pension interest may be awarded to an ex- spouse.