



WOOLWORTHS GROUP RETIREMENT FUND

MAKING THE DIFFERENCE TO YOUR RETIREMENT

WHEN I DIE...

When you pass away, there are many things that need to be taken care of.

This booklet will help those left behind to close off your affairs and tie up your estate.



MY NAME

If you are reading this, it means that I have passed on.

This booklet has been created to make things a little easier for you to close off my estate. It contains all the important information and contact details that you may need. Thank you for doing this.

Please use this booklet in conjunction with my Last Will and Testament to manage the proceeds of my belongings and my liabilities. I have tried to keep everything as up to date as possible, but you may find that some information is no longer applicable.

If you work through this step by step, you will be able to close off all the aspects that I considered important in my life. It should be a fairly quick and easy process if you follow the guidelines.

I deeply appreciate the fact that you will be doing this and wish you all the best.

SIGNATURE

IMPORTANT CONTACT NUMBERS

You must make claims on my: 1. Pension Benefits 2. Group Life Assurance 3. Shares 4. Final Salary 5. IRP5 Certificate 6. Healthcare Certificate	Woolworths Benefits Department Tel: 021 407 9111
To make claims on my funeral cover:	Unison Risk Management Alliance Tel: 021 464 4960
To cancel my memberships: Example: Virgin Active	1. <input type="text"/> 2. <input type="text"/> 3. <input type="text"/> 4. <input type="text"/>
Property:	Asset Manager
To pay up all outstanding debts on my loans:	Loans Manager
To clarify UIF arrangements for my domestic:	Unemployment Insurance Fund Tel: 012 337 1680 or 0800 843 843

MY LAST WILL & TESTAMENT

Inform the executor of my Will to start the proceedings of closing the estate.

My Will was last updated on

IN THE EVENT OF MY DEATH:

Please contact the following person to manage the proceedings of tying up my estate.

My Will No.

The executor of my Will is:

Name

Tel.

Email

My original signed Will is in safekeeping at

INFORM WOOLWORTHS

VERY IMPORTANT – WOOLWORTHS WILL NEED TO BE CONTACTED.

You can phone the switchboard at Woolworths Head Office on **021 407 9111** and ask to speak to:

Name

to inform them of my passing. They will put you in touch with the relevant people.

You will need to quote my employee no.

YOU MUST ENSURE THAT THE FOLLOWING ITEMS ARE TAKEN CARE OF AT WOOLWORTHS:

- 1. FINAL SALARY and any money owing to me.** This must be used to settle any Woolworths debt. There should be no balance, but if there is, my final salary must be used to settle the debt. The balance of the money must be used for any expenses that may emerge.
- 2. My PENSION PAYOUT** will be paid out as per the beneficiaries listed on my beneficiary statement.
- 3. There is also a FUNERAL BENEFIT** at Woolworths for the amount of **R** which is payable to my family for funeral expenses over and above my own funeral cover. So in total there will be **R** to manage all my funeral expenses and any other costs that may occur.
- 4. My IRP5 CERTIFICATES** can be obtained from the Woolworths payroll department.
- 5. My HEALTHCARE CERTIFICATES** can be obtained from the Woolworths payroll department.
- 6. There is also LIFE COVER** from Group Life Assurance that will be payable if my death occurred while I was employed by Woolworths.

BANKING DETAILS

Debit orders, where applicable, **MUST BE CANCELLED.**

BANK ACCOUNT 1

Banking Institution	<input type="text"/>		
Branch Code	<input type="text"/>	Account No.	<input type="text"/>
Account Type	<input type="text"/>		
My bank manager needs to be contacted.	Name	<input type="text"/>	
	Tel.	<input type="text"/>	
	Email	<input type="text"/>	

BANK ACCOUNT 2

Banking Institution	<input type="text"/>		
Branch Code	<input type="text"/>	Account No.	<input type="text"/>
Account Type	<input type="text"/>		
My bank manager needs to be contacted.	Name	<input type="text"/>	
	Tel.	<input type="text"/>	
	Email	<input type="text"/>	

BANK ACCOUNT 3

Banking Institution	<input type="text"/>		
Branch Code	<input type="text"/>	Account No.	<input type="text"/>
Account Type	<input type="text"/>		
My bank manager needs to be contacted.	Name	<input type="text"/>	
	Tel.	<input type="text"/>	
	Email	<input type="text"/>	

BANK ACCOUNT 4

Banking Institution	<input type="text"/>		
Branch Code	<input type="text"/>	Account No.	<input type="text"/>
Account Type	<input type="text"/>		
My bank manager needs to be contacted.	Name	<input type="text"/>	
	Tel.	<input type="text"/>	
	Email	<input type="text"/>	

BANK ACCOUNT 5

Banking Institution	<input type="text"/>		
Branch Code	<input type="text"/>	Account No.	<input type="text"/>
Account Type	<input type="text"/>		
My bank manager needs to be contacted.	Name	<input type="text"/>	
	Tel.	<input type="text"/>	
	Email	<input type="text"/>	

BANK CARD DETAILS

Please contact the listed institution to cancel my credit/debit and bank cards.

BANK CARD 1

Banking Institution	<input type="text"/>		
Name on Card	<input type="text"/>		
Card No.	<input type="text"/>		

BANK CARD 2

Banking Institution	<input type="text"/>		
Name on Card	<input type="text"/>		
Card No.	<input type="text"/>		

BANK CARD 3

Banking Institution	<input type="text"/>
Name on Card	<input type="text"/>
Card No.	<input type="text"/>

BANK CARD 4

Banking Institution	<input type="text"/>
Name on Card	<input type="text"/>
Card No.	<input type="text"/>

All credit cards have cover in the event of death. This means all outstanding balances, if applicable, will be settled in full. Each credit card company will need to be contacted to notify them of my death. They will advise you which documents you will need to complete.

NOTES

MOTOR VEHICLES

The outstanding balance on the motor vehicles will be settled in full by the insurance company. Hence there will be no debt in this regard. Please note that new insurance will need to be taken out immediately as the insurance will cease upon payout.

VEHICLE FINANCING

Account No.	<input type="text"/>
Name of Company	<input type="text"/>
Tel.	<input type="text"/>
Email	<input type="text"/>
Vehicle Registration	<input type="text"/>
Vehicle Model	<input type="text"/>
Year of Registration	<input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
Engine No.	<input type="text"/>
VIN/Chassis No.	<input type="text"/>
Vehicle insurance is with	<input type="text"/>
Tel.	<input type="text"/>
Email	<input type="text"/>
Debt cover insurance is with	<input type="text"/>
Tel.	<input type="text"/>
Email	<input type="text"/>

LOANS

Loans at financial institutions usually have insurance protection to settle any outstanding debt in the event of one's death. Please ask the executor to check on and manage these policies. The following institutions/private lenders need to be informed of my death:

INSTITUTION/PRIVATE LENDER

POLICY NO.

CONTACT DETAILS

INCOME TAX

All my tax returns should be up to date depending on the time of year.

TAX DETAILS

My income tax no.

TAX CONSULTANT'S DETAILS

In the event of my death, please contact

in order to manage all the issues related to SARS.

INSURANCE

Cover/Policy No.	<input type="text"/>	
Insurer	<input type="text"/>	Tel No. <input type="text"/>
Beneficiaries	<input type="text"/>	
Cover/Policy No.	<input type="text"/>	
Insurer	<input type="text"/>	Tel No. <input type="text"/>
Beneficiaries	<input type="text"/>	

PROPERTY

BOND DETAILS

Banking Institution	<input type="text"/>
Bond Account No.	<input type="text"/>
Bond Insurer	<input type="text"/>

PERSONAL BELONGINGS

SHARES & STOCK MARKET

I hold the following shares from Woolworths. Once Woolworths has been notified of my death, they will pay my beneficiaries whatever is due from my shares.

NOTES ON MY SHARES

TV LICENCE

SABC will need to be notified in the event of my death and **my TV licence account will need to be cancelled.**

My TV licence account no.

EMPLOYEES

EMPLOYEE/DOMESTIC WORKERS DETAILS

Name

Tel. Identity No.

He/she will need to be informed in the event of my death as he/she will in effect become unemployed. He/she also holds keys to my home which will need to be collected.

The Unemployment Insurance Fund will need to be notified of my death. Their contact number is **012 337 1680** or **0800 843 843.**

The UIF details are as follows:

UIF Reference No.

CELLPHONE CONTRACTS

The number of the customer care line is

	CONTRACT 1	CONTRACT 2
Service Provider		
Account No.		
Cellphone No.		

