



STANLIB

Liberty Living Annuity

Underwritten by Liberty Group Limited, a registered Long-Term Insurer.

Application for a Transfer from any Liberty-sold Living Annuity into the Liberty Living Annuity

- This form is used to instruct Liberty to transfer your existing Living Annuity into a Liberty Living Annuity.
- Transfers from Flexible Annuity policies with an Income Enhancer Benefit (IEB) are permitted and the current IEB percentage on the transferring policy will be retained.
- For Flexible Annuities sold after 1 October 2016, the value of the upfront enhancement will be deducted when transferring to the Liberty Living Annuity.
- Please refer to the contact details below for any enquiries or questions.
- Transfer value must be at least R 100 000.00.
- Only one-to-one transfers are permitted.

REQUIRED DOCUMENTATION

Please submit this form, signed, together with the following documents:

- Clear copy of your bar-coded ID/copy of back and front of the ID smart card/birth certificate (if a minor)/valid passport (if a foreign national).
- A copy of the completed New Business Investment Form in respect of the Liberty Living Annuity, signed by the client, reflecting zero% initial commission and the initial annuity amount payable after transfer.

SEND COMPLETED FORM TO

E-mail: Lispinstructions@stanlib.com or **Fax:** +27(0) 867 277 516 or +27(0)11 448 6666

CLIENT DETAILS

LIBERTY INVESTMENT NUMBER	<input type="text"/>
NAME & SURNAME/ENTITY NAME	<input type="text"/>
IDENTITY/PASSPORT	<input type="text"/>

Note: Liberty's records will be updated with the personal information you provide on the Liberty Living Annuity application form, to comply with the South African Revenue Service ('SARS') IRP5/IT3(a) tax certificate requirements.

STATEMENT OF INFORMATION FOR TRANSFER

INITIAL COMMENCEMENT DATE	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	D D M M Y Y Y Y
LAST INCOME WITHDRAWAL AMOUNT (GROSS)	R <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
INCOME TAX DEDUCTED	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
NET INCOME PAID TO ANNUITANT	R <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
INCOME FREQUENCY	<input type="checkbox"/> MONTHLY <input type="checkbox"/> QUARTERLY <input type="checkbox"/> BI-ANNUALLY <input type="checkbox"/> ANNUALLY
CURRENT INCOME DRAWDOWN PERCENTAGE	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
ANNIVERSARY DATE	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
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