REST Undertakers | FINBURY CAPITAL Independent Financial Advisors | Sanlam

Voluntary Funeral Scheme Application Form

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☐ **Principal Member Only Funeral Benefit** **Cover Option: R**_____ **Premium: R**_____	☐ **Single Parent Benefit** **Cover Option: R**_____ **Premium: R**_____	☐ **Principal Member & Immediate Family Funeral Benefit** **Cover Option: R**_____ **Premium: R**_____
Additional Extra Cover	**Additional Extra Cover**	**Additional Extra Cover**
Accidental Death Funeral Cover ☐ **Cover Option: R**_____ **Premium: R**_____	Accidental Death Funeral Cover ☐ **Cover Option: R**_____ **Premium: R**_____	Accidental Death Funeral Cover ☐ **Cover Option: R**_____ **Premium: R**_____
Extended Family Funeral Cover ☐ **Cover Option: R**_____ **Premium: R**_____	Extended Family Funeral Cover ☐ **Cover Option: R**_____ **Premium: R**_____	Extended Family Funeral Cover ☐ **Cover Option: R**_____ **Premium: R**_____
Tombstone, Grocery & Beef Benefit (Main Member Only) ☐ **Cover Option: R**_____ **Premium: R**_____	Tombstone, Grocery & Beef Benefit (Immediate Family Only) ☐ **Cover Option: R**_____ **Premium: R**_____	Tombstone, Grocery & Beef Benefit ☐ **Cover Option: R**_____ **Premium: R**_____
Total Premium **R**_____	**Total Premium** **R**_____	**Total Premium** **R**_____

A. Principal member details

Full name & surname:		Gender: Male ☐ Female ☐
ID number:	Passport number (if applicable):	
Home / cell:	Work / cell:	Email:
Residential address - house number & street:		
Suburb:	Postal code:	Country of residence:
Postal address (if different):	Postal code:	Country of birth:
Nationality:	Occupation:	Employee number:
Source of income:		

B. Additional members - immediate and extended family

Max. 9 members including principal; max. 8 extended; max. 5 immediate. Tick last column for extended family.

Full name & surname	Gender	Relationship	ID / passport number	Premium (R)	Extended family
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐

C. Beneficiary details

Full name & surname:		Relationship:
ID / passport number:		Date of birth:
Cell:	Email:	
Address:		

Premium deduction authority, declarations & privacy

Read this page before signing. The signatures below apply to all three sections on this page.

D. Premium deduction authority

Debit my bank account on day: _____ Total premium: R _____

I hereby authorize Sanlam Developing Markets Limited (Sanlam) to draw against my account with the bank mentioned below (or any other bank or branch to which I transfer my account) the premium due in respect of this policy, on the_____ day of each month continuing until the instruction is cancelled by me. All such withdrawals from my bank account by Sanlam shall be treated as though they have been signed by me personally. I understand that the withdrawals hereby authorized will be processed by the ACB Magnetic Tape Service, or any other collection service applicable and that details of each withdrawal will be printed on my bank statement or applicable voucher. I agree to pay any bank charges or collection fees relating to this debit order or deduction instruction. This authority may be cancelled by me giving Sanlam 31 (thirty-one) days' notice in writing, sent by email prepaid registered post. I understand that I shall not be entitled to any refund amounts which have been withdrawn while this authority was in force if such amounts were legally owing to Sanlam. Receipt of this instruction by Sanlam shall be regarded as receipt thereof by my bank or premium payment facilitator (whichever it is or will be). I am responsible to ensure that my monthly premium is paid.

Account holder	Cell
ID / passport number	Email
Source of funds / income	Country of residence
Occupation	Country of birth
Bank	Effective date (YYYY/MM/DD)
Branch name	Branch code

Account number: _____

Account type:

☐ Current (Cheque) ☐ Savings ☐ Transmission

☐ Other (specify): _____

E. Declaration of acceptance

Please read and understand the summary of cover benefits on the terms and conditions.

I herewith apply to participate in the @Rest Funeral Plan by Finbury Capital in accordance with its Terms and Conditions. I understand that the above information and supporting documents shall be the basis of the Contract. I declare the above information, whether in my own handwriting or not, is true and correct. I understand that any false/incorrect information or misstatement in the application will invalidate any claim or benefit under the policy and I undertake to abide by the Terms and Conditions of the policy. Sanlam Developing Markets Limited (SDM) shall not be liable for any amount until it has accepted this application and has received the first premium. I understand that Sanlam Developing Markets Limited has the right to defer a claim under this policy until all requirements, as specified by Sanlam Developing Markets Limited, have been met. If the premium of this policy is paid by an approved stop order, and the first deduction is received, up to 90 days from the original specified date, Sanlam Developing Markets Limited has the right to adjust the date of issue of this policy accordingly. The Principal Member may cancel the policy at any time by giving 1 (one) day's written notice to Sanlam Developing Markets Limited. It is important to remember that cancellation normally leads to loss of valuable benefits and should be avoided where possible. By signing this form; I give Sanlam permission to use my information to check whether it appears on any sanction/crime watch lists, as required by law, and to inform the relevant legal bodies if it does appear on any sanction/watch lists. I understand that, in terms of the law, Sanlam cannot pay any benefits/refunds to me if my details are on any sanction lists. I acknowledge that I have read and understood this declaration.

F. Protection of Personal Information (POPIA) declaration

Sanlam Developing Markets Limited ("SDM"), a subsidiary of Sanlam Life Insurance Limited ("Sanlam Life") will process and protect your personal information as required by all relevant laws including the Protection of Personal Information Act, 4 of 2013 (POPIA). Such personal information may include, but not be limited to, your current wellness, medical history, finances and other details required by the application form / agreement. The provision of information required by this application form / agreement is mandatory and Sanlam Life may not provide the products or services without this information. We shall process your personal information (and may share with our service providers, data bureaus and business units and companies which are part of the Sanlam Group) to: • conclude and administer this application, which may include underwriting; • allow for the collection of payments; • assess, process claims and to process any mandatory checks; • comply with all legal and regulatory requirements, including industry codes of conduct; • prevent loss, fraud; • share with intermediaries appointed as official intermediaries or who have your written approval so that they can provide you with financial advice and / or intermediary services; • administer your membership to a loyalty / rewards / wellness or benefit programme; • share with external benefit providers which are not part of the Sanlam Group to provide you with benefits which stem from your membership to a loyalty / rewards / wellness or benefit programme; • share with bureaus to enhance and enrich our understanding of our customer base; • execute the Sanlam Group's strategic initiatives; • share information with other entities in the Sanlam Group, so that we can market our financial products and services which we deem similar, with the aim of offering you the opportunity to take up some of the financial products to fulfil your needs, provided that, you have not objected to receiving such marketing; • conduct market research from time to time via email, telephone, or other means (for example, invite you to events); • share your personal information with third parties if there is a legitimate reason to do so; and / or • include further purposes compatible with the above. For more information about how your personal information is processed, analyzed, and stored, please visit our privacy notice at www.sanlam.co.za. Further processing and storage may require that we send your personal information to service providers outside of the Republic of South Africa on SDM's behalf. Unless we have a binding agreement with the service provider which ensures that it effectively adheres to the principles for processing of information in accordance with POPIA, we will not send your personal information to a country that does not have substantially similar laws to that of the Republic of South Africa which provide for the protection of personal information.

Prior to giving SDM a minor child's personal information, I understand that SDM may require additional information to confirm that I am authorized to provide the child's information. By providing the personal information, I consent to SDM collecting and processing the child's information in my capacity as the child's guardian or competent person. For information on how to: • access or request a copy of your personal information processed by us. • ask for an update and / or correction of your personal information. Please consult our Manual published in terms of the Promotion of Access to Information Act, 2002 (PAIA) available on our website (www.sanlam.co.za).

By completing and submitting this application form / agreement, you: • agree that SDM (including its various business divisions) may process your personal information for direct marketing purposes, including by contacting you telephonically to market financial products and services to you with the aim of affording you an opportunity to taking up some of the financial products to fulfil your needs; • consent to SDM sharing your contact details with other companies which are part of the Sanlam Group for purposes of direct marketing and contacting you telephonically to market financial products and services to you; • consent to the storage of personal information in line with applicable legislation and internal policies. Records may be retained for periods in excess of prescribed periods for historical, statistical, research purposes. SDM will implement necessary safeguarding measures to protect the integrity and confidentiality of data stored.

Opting-out of direct marketing: Due to you being a client of SDM, we may provide you with information (incl. marketing information) about our similar financial products and other services, which may include text messages, emails, and the like. Should you not wish to receive marketing or advertising information from us, please contact SDM Customer Care Centre at: 0800 00 6838 to Opt-out. Were you choose to exercise your right to opt out of direct marketing, please allow up to 21 days for SDM to effect that change.

Objection from processing your personal information: You may withdraw your consent to sharing of contact details and any other personal information with Sanlam Group companies at any time by contacting SDM Customer Care Centre on email on info@sanlamsky.co.za. Should you wish to object / withdraw from SDM processing your personal information, please note that cover in terms of the Policy may terminate as the processing of the personal information is material to servicing the Policy. Once I withdraw my consent, I understand that SDM is still obliged under applicable legislation to keep the information for at least 5 years after termination of the business relationship between SDM and myself.

Signature of principal member | Signature of premium payer | Date: YYYY/MM/DD

Finbury Capital is an authorized Financial Services provider: FSP Number 47671.
Sanlam Developing Markets Limited, Reg. No. 1911/003818/06, FSP No. 11230. Standard product Terms and Conditions apply.