

## @Rest Funeral Plan, by Finbury Capital

### Voluntary Funeral Scheme

### Application form

## @Rest Funeral Plan, by Finbury Capital

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Email | [funeral@finbury.co.za](mailto:funeral@finbury.co.za)

[www.atrestfuneralplan.co.za](http://www.atrestfuneralplan.co.za)

### A. Principal Member Information

Title _____	Initials _____	Gender <input type="checkbox"/> M <input type="checkbox"/> F	Full names _____
Surname _____	Occupation _____		
Employer name _____	Industry _____		
Sub-employer name _____	Employee number _____		
Cell _____	ID/ Passport number _____		
Date of birth _____ Y Y Y Y / M M / D D	Country of birth _____		
Country of residence _____	Email _____		
Physical / Postal address _____			
City / Town _____		Code _____	

**Source of funds with the following options:**

Grants - Disability / Social grant <input type="checkbox"/>	Allowance <input type="checkbox"/>	Salary / Wage <input type="checkbox"/>
Pension replace with Policy / Fund pay-outs (investment products etc) as a suggestion. <input type="checkbox"/>	Savings / Investments <input type="checkbox"/>	(Rental, dividends and interest income) <input type="checkbox"/>
Business Income <input type="checkbox"/>	Inheritance / Gifts / Donations/Winnings <input type="checkbox"/>	

**Important:** Have you had a funeral policy that has been active for the past 31 days? ☐ Y ☐ N

### B. Beneficiary details in the event of death of the Principal Member

First Name	Surname	ID / Passport number	Relationship	Contact
		Y Y M M D D		

**Note:** Only one beneficiary above the age of 18 years may be nominated.

### C. Immediate Family Details

First Name	Surname	ID / Passport number	Relationship	Option
		Y Y M M D D		
		Y Y M M D D		
		Y Y M M D D		
		Y Y M M D D		
		Y Y M M D D		
		Y Y M M D D		

**Note:** A maximum of 1 spouse and 5 children may be covered under the immediate family funeral benefit

### D. Extended Family details

Please complete the details of your Extended Family in the table below.

First Name	Surname	ID / Passport number	Relationship	Option
		Y Y M M D D		
		Y Y M M D D		
		Y Y M M D D		
		Y Y M M D D		
		Y Y M M D D		
		Y Y M M D D		
		Y Y M M D D		
		Y Y M M D D		

**Note:** A maximum of 8 extended family members may be covered under the extended family member funeral benefit

## E. Single Parent Funeral Benefit

Please complete the details of your children Benefit in the table below.

First Name	Surname	ID / Passport number										Relationship	
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						

**Note:** A maximum of 5 children may be covered under the single parent benefit.

## F. Couple Funeral Benefit

Option

Please complete the details of your couple Benefit in the table below.

First Name	Surname	ID / Passport number										Relationship	
		Y	Y	M	M	D	D						

**Note:** A maximum of 1 partner may be covered under the couple benefit.

## G. Parents - Parents-inlaw Funeral Benefit

Option

Please complete the details of your parents - parents-in law Benefit in the table below.

First Name	Surname	ID / Passport number										Relationship	
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						

**Note:** A maximum of 4 parents - parents-in law may be covered under the parents - parents-in law benefit.

## H. Principal Member Plus 5 details

Option

Please complete the details of your Principal Member Plus 5 Benefit in the table below.

First Name	Surname	ID / Passport number										Relationship	
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						

**Note:** A maximum of 5 dependants may be covered under the principal member plus 5 funeral benefit.

## I. Principal Member Plus 9 details

Option

Please complete the details of your Principal Member Plus 9 Benefit in the table below.

First Name	Surname	ID / Passport number										Relationship	
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						

**Note:** A maximum of 9 dependants may be covered under the principal member plus 9 funeral benefit.

## J. Principal Member Plus 13 details

Option

Please complete the details of your Principal Member Plus 13 Benefit in the table below.

First Name	Surname	ID / Passport number										Relationship	
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						
		Y	Y	M	M	D	D						

**Note:** A maximum of 13 dependants may be covered under the principal member plus 13 funeral benefit.

## K. Premium deduction authority

☐ Persal
 ☐ Cash
 ☐ Debit
 Total premium **R** \_\_\_\_\_

I hereby authorize @Rest Funeral Plan, by Finbury Capital 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 @Rest Funeral Plan, by Finbury Capital, shall be treated as though they have been signed by me personally. I understand that the withdrawals hereby authorised 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 @Rest Funeral Plan, by Finbury Capital 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 @Rest Funeral Plan, by Finbury Capital. Receipt of this instruction by @Rest Funeral Plan, by Finbury Capital, 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.

Name of account holder \_\_\_\_\_ Email \_\_\_\_\_  
 ID/Passport number \_\_\_\_\_ Industry \_\_\_\_\_  
 Source of funds/Income \_\_\_\_\_ Country of residence \_\_\_\_\_  
 Occupation \_\_\_\_\_ Country of birth \_\_\_\_\_  
 Name of bank \_\_\_\_\_ With effect from \_\_\_\_\_ Y Y Y Y / M M / D D  
 Branch name \_\_\_\_\_ Branch code \_\_\_\_\_ Y Y Y Y / M M / D D  
 Account number \_\_\_\_\_ Deduction date \_\_\_\_\_ Y Y Y Y / M M / D D  
 Account type ☐ Current (Cheque) ☐ Savings ☐ Transmission ☐ Other (Please specify) \_\_\_\_\_  
 \_\_\_\_\_ Y Y Y Y / M M / D D  
 Signature of Principal Member Signature of Premium Payer Date

## L. 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.

@Rest Funeral Plan, by Finbury Capital, shall not be liable for any amount until it has accepted this application and has received the first premium. I understand that @Rest Funeral Plan, by Finbury Capital has the right to defer a claim under this policy until all requirements, as specified by @Rest Funeral Plan, by Finbury Capital, 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, @Rest Funeral Plan, by Finbury Capital has the right to adjust the date of issue of this policy accordingly.

The policyholder may cancel the policy at any time by giving 1(one) day's written notice to @Rest Funeral Plan, by Finbury Capital. 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 @Rest Funeral Plan, by Finbury Capital 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, @Rest Funeral Plan, by Finbury Capital 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.

\_\_\_\_\_ Y Y Y Y / M M / D D  
 Signature of Principal Member Date

**NB:** Please send a completed form to funeral@finbury.co.za

## M. Protection of Personal Information (“POPIA”) Declaration

@Rest Funeral Plan, by Finbury Capital, 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 bureaux and business units and companies which are part of the @Rest Funeral Plan, by Finbury Capital 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 program;
- share with external benefit providers which are not part of the @Rest Funeral Plan, by Finbury Capital Group to provide you with benefits which stem from your membership to a loyalty / rewards / wellness or benefit programme;
- share with bureaux to enhance and enrich our understanding of our customer base;
- execute the @Rest Funeral Plan, by Finbury Capital strategic initiatives;
- share information with other entities in the @Rest Funeral Plan, by Finbury Capital, 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. Further processing and storage may require that we send your personal information to service providers outside of the Republic of South Africa on @Rest Funeral Plan, by Finbury Capital 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 @Rest Funeral Plan, by Finbury Capital a minor child's personal information, I understand that @Rest Funeral Plan, by Finbury Capital may require additional information to confirm that I am authorised to provide the child's information. By providing the personal information, I consent to @Rest Funeral Plan, by Finbury Capital 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.

By completing and submitting this application form / agreement, you:

- agree that @Rest Funeral Plan, by Finbury Capital (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 @Rest Funeral Plan, by Finbury Capital sharing your contact details with other companies which are part of the @Rest Funeral Plan, by Finbury Capital, 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.
- @Rest Funeral Plan, by Finbury Capital, 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 @Rest Funeral Plan, by Finbury Capital, 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 @Rest Funeral Plan, by Finbury Capital Customer Care Centre at: 021 850 0118 to Opt-out. Where 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 @Rest Funeral Plan, by Finbury Capital at any time by contacting @Rest Funeral Plan, by Finbury Capital Customer Care Centre on email on [info@finbury.co.za](mailto:info@finbury.co.za).
- Should you wish to object / withdraw from @Rest Funeral Plan, by Finbury Capital, 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 @Rest Funeral Plan, by Finbury Capital is still obliged under applicable legislation to keep the information for at least 5 years after termination of the business relationship between @Rest Funeral Plan, by Finbury Capital and myself.

Signature of Principal Member

Date

Y Y Y Y / M M / D D