



**Natal Joint Municipal Pension
KwaZulu-Natal Joint Municipal
Provident Funds**

"Your Fund, Your Savings, Your Future"



GUARDIAN'S ASSESSMENT

Please note that a guardian assessment must be completed for each guardian claiming on behalf of a minor child.

SECTION 1: DETAILS OF THE DECEASED

Name of the deceased: _____

ID number of the deceased: _____

SECTION 2: DETAILS OF THE GUARDIAN

Name of the guardian: _____

ID number of the guardian: _____

SECTION 3: DETAILS OF THE MINOR CHILD/CHILDREN

Name of minor child	ID of minor child

Please complete the following questions in full.

1) Are you employed or were you ever employed?

2) What are your skills/qualifications?

3) What is the total of your expenditure each month?

4) Have you ever found that your income does not cover your expenses?

5) Have you been saving money?

6) How many people do you support financially?

7) If a lump sum becomes payable to you on behalf of the minor child, how do you plan on controlling the lump sum?

8) Would you prefer the money be placed in a Trust on behalf of the minor child and monthly payments made to you?

9) If your answer to Question 8 is Yes, the Fund will invest the benefit into the ABSA Beneficiary Trust unless you provide the Fund with details of a trust of your choice.

Details of the Trust of your choice:

Signed by guardian

Date

Signed by witness

Date