

UNCLAIMED RETIREMENT FUND BENEFIT SEARCH ENGINE HAS BEEN IMPLEMENTED

1. Unclaimed retirement benefit search process

- 1.1 An enquirer will be provided with a unique reference number for each enquiry logged through the FSB search engine. This reference number must be used for future correspondence or enquiries regarding the specific case with the FSB.
- 1.2 The search engine will establish if there is a possible match on each of the search criteria provided.
- 1.3 If a possible matching record(s) is identified, the enquirer will be provided with the name(s) and contact details of the administrator and/or fund(s). A message will be also be e-mailed to the administrator/ UB contact person informing them of the possible match and provide them with contact details as furnished by the enquirer.
- 1.4 Once the enquirer have been provided with the contact detail, he/she will be required to contact the fund / administrator directly and then follow the normal claims process of a fund to lodge a valid claim.
- 1.5 If there is no matching record(s), the enquirer will be notified that no match could be found on the unclaimed benefits search engine.
- 1.6 Funds and administrators will be requested to update the unclaimed benefit data base regularly and the UB search engine will automatically check on a regular basis if a possible match is identified on the updated records. If a possible match is identified at a later stage, the enquirer will be provided with the name and relevant contact details of the fund or administrator.

2. Searching on the Web-based search engine

The UB search engine will be available on the FSB website (Departments > Retirement Funds > Searches > Unclaimed Benefits Search) or on the following link:

http://www.fsb.co.za/Magic94Scripts/mgrqispi94.dll?APPNAME=Web&PRGNAME=UB_Partial_Search

An enquirer (person enquiring in respect of him/herself or on behalf of somebody else) should complete certain data fields such as name, surname, contact number or e-mail address (an e-mail address must be provided to enable a response to an enquirer). This search engine has been established to enable persons to do an enquiry free of charge and may not be used by entities or persons to do tracing on behalf of persons for a fee.

Unclaimed Benefits Search

The enquiry is on behalf of myself		<input type="checkbox"/>	
Name and surname of person on whose behalf you are enquiring		<input type="text"/>	
I have obtained proper consent to do this enquiry and will not disclose any personal information of the said person to anyone else		<input type="checkbox"/>	
Enquirer's Details			
Query No	0	Names *	<input type="text"/>
Initials	<input type="text"/>	Surname *	<input type="text"/>
Postal Address	<input type="text"/>	Telephone No.	<input type="text"/>
	<input type="text"/>	Cell Number **	<input type="text"/>
	<input type="text"/>	Fax Number	<input type="text"/>
Postal Code	<input type="text"/>	Email Address **	<input type="text"/>
I hereby give consent that the FSB may retain my personal information and that the information may be disclosed to the relevant contact person of the administrator of the fund if a possible match is identified.		<input type="checkbox"/>	

The fields marked with an * are compulsory fields.
** Cell Number or Email Address must be completed.

In order for the UB search engine to enhance the possibility of the system to establish a possible match, an enquirer should provide as much as possible information about the person in respect of which the enquiry is made.

Detail of Person in respect of whom the enquiry is made					
Initials	<input type="text"/>	Name	<input type="text"/>	Surname	<input type="text"/>
Employer Name	<input type="text"/>				Exact Surname Search <input type="checkbox"/>
Date of Birth	<input type="text" value="00000000"/>	RSA ID No	<input type="text"/>	Passport No	<input type="text"/>
Fund No	<input type="text"/>	Fund Name	<input type="text"/>		
Participating Employer No	<input type="text"/>	Participating Employer Name	<input type="text"/>		

3. E-mail enquiries by providing an ID number only

The enquirer should enter the ID number of the person on whose behalf the enquiry is made as the subject on an email to the dedicated email address, Pensions.UBmemberID@FSB.co.za, to enquire if there are any unclaimed benefits due to a person.

<input type="button" value="Send"/>	<input type="button" value="Save draft"/>	<input type="button" value="Discard"/>	<input type="button" value="Attachments"/>
To: <input type="text" value="pensions.UBmemberID@fsb.co.za *"/>			
From: kleyn@axxess.co.za			
Subject: <input type="text" value="3906010001089"/>			
<input type="button" value="B"/> <input type="button" value="I"/> <input type="button" value="U"/> <input type="button" value="S"/> <input type="button" value="Text"/> <input type="button" value="List"/> <input type="button" value="Link"/> <input type="button" value="Image"/> <input type="button" value="Smiley"/> <input type="button" value="Text"/> <input type="button" value="edit markup"/> <input type="button" value="spellcheck"/>			

An unsuccessful search on an ID number only does not necessarily mean that there is not an unclaimed benefit. Therefore, where a search is unsuccessful, an enquirer should send additional information by e-mail (see paragraph 4 below) or do an enquiry on the FSB website (see paragraph 2 above).

4. E-mail enquiries – general request

To enquire if there are possible unclaimed benefits an enquirer should provide as much as possible information, such as Name(s) and Surname, Fund Name, Employer name, Date of birth and ID number, on an email to the following e-mail address, Pensions.UBQuery@FSB.co.za.

<input type="button" value="Send"/>	<input type="button" value="Save draft"/>	<input type="button" value="Discard"/>	<input type="button" value="Attachments"/>
To: <input type="text" value="pensions.UBQuery@fsb.co.za *"/>			
From: kleyn@axxess.co.za			
Subject: <input type="text" value="Unclaimed Benefits Query"/>			
<input type="button" value="B"/> <input type="button" value="I"/> <input type="button" value="U"/> <input type="button" value="S"/> <input type="button" value="Text"/> <input type="button" value="List"/> <input type="button" value="Link"/> <input type="button" value="Image"/> <input type="button" value="Smiley"/> <input type="button" value="Text"/> <input type="button" value="edit markup"/> <input type="button" value="spellcheck"/>			
<p>Good day</p> <p>Kindly verify whether any unclaimed benefits are due to me.</p> <p>My details are the following: Name: Maria Surname: <u>Masimula</u> ID: 6501140001089 Date of Birth: 14 January 1965 Employers: GEF Stores, Mannies Shoe shop, <u>Doornpoort</u> Grocery Store. Pension Fund Name: Unknown</p> <p>Regards Maria <u>Masimula</u> Cell no. 082 5638 222</p>			

5. Fax submissions

To enquire if there are possible unclaimed benefits an enquirer must send a fax to 0865781183 providing as much as possible information, such as Name(s) and Surname, Fund Name, Employer name, Date of birth and ID number.

6. Telephone enquiries

The toll-free numbers for enquiries are 0800 110 443 or 0800 202 087. This facility will enable the public to enquire by telephone free of charge as all charges will be carried by the FSB.

To enquire if there are possible unclaimed benefits an enquirer must provide the call centre with as much as possible information such as, Name(s) and Surname, Fund Name, Employer name, Date of birth and ID number.

7. Walk-in clients

Walk-in clients will be assisted by FSB staff to establish if there are possible unclaimed benefits due to such person.

The physical address of the FSB is River Walk Office Park, Block B, 41 Matroosberg Road, Ashlea Gardens, Pretoria.

8. Written enquiries

To enquire about possible unclaimed benefits, an enquirer must provide as much as possible information such as, Name(s) and Surname, Fund Name, Employer name, Date of birth and ID number to the FSB in writing. It should be noted that an enquirer must include all or at least one of the following:

- contact number
- e-mail address
- contact address

where a response to the enquiry can be sent.

The letter should be addressed to:

The Financial Services Board
Pensions: Surveillance and Enforcement
PO Box 35655
Menlo Park
Pretoria
0102