



BonCap income verification form 2019

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This form is only to be used by existing members who are on the BonCap option.

Please note:

- You must attach copies of identity documents or passports for you and your dependants to this form
- If you do not complete this form in full and attach the required documents, you will be defaulted to the highest income band
- We will only verify your spouse's income if they are a dependant on your plan.

Section 1: Main member's details

Please fill in your details below. Ensure that all fields are marked clearly and can be read easily.

Title: Surname:

First names:

Identity number: Date of birth:

Marital status: Membership number:

Cellphone: Gender: M F

Telephone (w): Telephone (h):

Email:

Section 2: Spouse/partner's details

Please fill in your spouse/partner's details below. Ensure that all fields are marked clearly and can be read easily.

Title: Surname:

First names:

Identity number: Date of birth:

Cellphone: Gender: M F

Telephone (w): Telephone (h):

Email:

Section 3: Contribution payer's details

This section must only be completed for members whose premiums will be paid by a third party, for example if your premiums are paid by your parents or children. The third party must fill in their information below and sign the declaration.

Title: Surname:

First names:

Identity number: Date of birth:

Cellphone: Telephone (h):

Telephone (w):

Email:

Bank name:

Branch name: Branch code:

Account number: Account type:

Name of account holder:

I instruct Bonitas to electronically collect contributions by debit order, using the information above. I understand that transfers cannot be done to and from credit card accounts. I also irrevocably authorise Bonitas to adjust any incorrect transactions and/or correct any electronic transfer or funds errors without prior notice.

Contribution payer's signature: _____

Section 4: Declaration of income

BonCap contributions are income based. We will look at the higher gross monthly income of you or your registered spouse/partner to calculate your contribution. This income is any fixed remuneration (eg: your salary or wages and excludes variable amounts such as commissions, bonuses, allowances and overtime).

Description of income	Main member R per month	Spouse/partner R per month
Salary or wages		
Commission and other rewards		
Pensions or annuities		
Rental income		
Trust distributions		
Government grants		
UIF payments		
Interest on investments		
Subsidies of any kind		
Maintenance		
Other income		
Total income	R	R

We also require the documents in the table below to be attached to this form for you and your spouse/partner. **If the required documents are not submitted with this form, you will be defaulted to the highest income band.**

If you	We need
Earn a monthly salary or salary with commission	Your latest payslip + Your bank statements for the last three months (showing the monthly income you receive)
Get paid weekly/fortnightly wages	Four latest weekly payslips or two latest fortnightly payslips OR A letter from your employer/company confirming your income + Your bank statements for the last three months (showing the weekly/fortnightly/monthly income you receive)
Earn commission only	Proof of earnings OR Your last three commission statements + Your latest IRP5 + Your bank statements for the last three months (showing the monthly income you receive)
Are self-employed	A copy of your latest IT34A (SARS notice of assessment) + A letter from an external auditor/accounting firm confirming your income + Your bank statements for the last three months (showing the monthly income you receive)

If you	We need
Are unemployed	<p>Your UIF statement</p> <p>OR</p> <p>A retrenchment letter or dismissal letter if you were dismissed/retrenched in the past twelve months</p> <p>+</p> <p>Your bank statements for the last three months (showing the monthly income you receive)</p> <p>+</p> <p>A letter from the person paying your contributions, confirming their relationship to you and that they are paying for your medical aid</p>
Are a minor (including children at primary and secondary school)	<p>A letter from the person paying your contributions, confirming their relationship to you and that they are paying for your medical aid</p>
Are a full-time student (tertiary education)	<p>Proof of registration from your tertiary institution (student card only will not be accepted)</p> <p>+</p> <p>A letter from the person paying your contributions, confirming their relationship to you and that they are paying for your medical aid</p>
Are a foreign student	<p>A copy of your passport</p> <p>+</p> <p>Proof of registration from your tertiary institution</p> <p>+</p> <p>A letter from the person paying your contributions, confirming their relationship to you and that they are paying for your medical aid</p>
Are a foreign national (a person living in South Africa who is a citizen of another country)	<p>A copy of your passport</p> <p>+</p> <p>A copy of your work permit</p> <p>+</p> <p>A copy of your contract reflecting your contract period and monthly income</p> <p>+</p> <p>Your bank statements for the last three months (showing the monthly income you receive)</p>
Are temporarily disabled	<p>A copy of your IT34A (SARS notice of assessment)</p> <p>+</p> <p>A full medical report from your doctor</p> <p>+</p> <p>Your disability grant letter</p> <p>OR</p> <p>A letter from the Department of Social Development</p> <p>+</p> <p>Your bank statements for the last three months (showing the monthly income you receive)</p>
Are permanently disabled	<p>A full medical report from your doctor</p> <p>+</p> <p>Your disability grant letter</p> <p>+</p> <p>Your bank statements for the last three months (showing the monthly income you receive)</p> <p>+</p> <p>A letter from the person paying your contributions, confirming their relationship to you and that they are paying for your medical aid</p>

If you	We need
<p>Earn a Government pension (SASSA)</p>	<p>Your most recent SASSA pension statement</p> <p>OR</p> <p>A copy of an ATM mini statement confirming your monthly pension</p> <p>OR</p> <p>A copy of a withdrawal slip from a SASSA paypoint confirming your monthly pension</p> <p>OR</p> <p>A SASSA pension income letter (that is not older than six months)</p> <p>+</p> <p>Your bank statements for the last three months (showing the monthly income you receive)</p>
<p>Earn any other pension</p>	<p>A copy of your IT34A (SARS notice of assessment)</p> <p>OR</p> <p>Your most recent pension statement</p> <p>OR</p> <p>A pension income letter (not older than 6 months)</p> <p>+</p> <p>Your bank statements for the last three months (showing the monthly income you receive)</p> <p>+</p> <p>A letter from the person paying your contributions, confirming their relationship to you and that they are paying for your medical aid</p>

Please note: Bank statements submitted must clearly show the money earned being deposited into the account.

Section 5: Acknowledgement and consent

By signing this form, you declare that the information given is true and correct and that you give Bonitas Medical Fund permission to verify the declared income of you and your spouse/partner. Declaring income lower than your actual income is fraud. This will lead to the immediate cancellation of your membership and you will not be able to join Bonitas Medical Fund again.

Main member's signature: _____

Date: _____

Spouse/partner's signature: _____

Date: _____