

Retirement

Q&A

*"Every child is
a national asset"*



basic education

Department:
Basic Education
REPUBLIC OF SOUTH AFRICA

What is the official Retirement age?

- **Normal retirement age** in the public service is **60 years of age** when you may retire and receive full benefits.
- **Compulsory retirement age** is **65 years of age. Retirement must occur on the date of your 65th birthday.**
- **Voluntary retirement age** is **50 years of age for educators** and **55 years of age for public service officials**. Pension benefits will be scaled down proportionally in relation to the number of years to your 60th birthday.

What are the consequences of early Retirement?

- If you retire before your normal retirement age and have less than ten years of pensionable service, you will receive a gratuity equal to your actuarial interest in the pension fund.
- If you retire before your normal retirement age and have ten years or more of pensionable service, your annuities and gratuities are calculated according to the same formula as is used for normal retirement. However, you will be penalised with a reduction of a third of one percent for each month between the dates of early retirement and normal retirement.

Where can one obtain the required documentation and forms for Retirement?

All the relevant forms can be downloaded from the Government Employees Pension Fund (GEPF) website on www.gepf.gov.za or obtained from your nearest District or Provincial office.

STEPS in applying for a Pension upon Retirement.

Step 1: *Complete the relevant forms*

At least six months prior to reaching the age of retirement or date of required retirement, you must complete the following forms:.

- National Treasury Pensions Administration Form: Personal Particulars Form (Z864);
- Banking Particulars (Z894);
- Relevant Choice Form for payment of Benefits or the Particulars for a Transfer to an Approved Retirement Fund (Z1525);
- Choice Form for State Subsidised Medical Contribution;
- National Treasury Pensions Administration: Withdrawal from Fund Form (Z102); and
- Termination of Service Form.

Step 2: *Declaration of relevant forms*

- You are required to sign the declaration and initial each page of the completed Z864 form in the presence of a Commissioner of Oaths who will certify the form.

- You are required to sign the declaration of the completed Z894 form and ensure that your financial institution stamps and signs the Z894 form.

Step 3: *Attach supporting documentation*

- Attach the relevant supporting documentation as stipulated in each of the required forms to that specific form.

Step 4: *Submit your application to your school administrator or district office*

- Submit the completed forms and supporting documentation to your school administrator who will forward them to the district office.

Step 5: *Processing of forms*

- Submit the completed Housing Allowance application form together with the relevant supporting documentation to your school administrator or forward to the district office.

Applying for Pension upon Retirement

Step 1
Complete and sign the relevant forms,
at least six months prior to retiring.

Step 2
Ensure relevant forms are signed and declaration
completed by the Commissioner of Oaths and/or
the Financial Institution.

Step 3
Attach relevant supporting documentation
as stipulated in the forms.

Step 4
Submit forms and supporting documentation
to the school administration.

Step 5
Processing of forms takes place at Pensions
Administration Head Office and at
National Treasury in Pretoria.

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