

ONLINE SAVINGS (TWO POT) APPLICATION VIA THE WEBSITE

(Subsequent Application and with no change in details since previous claim)

Applying for Two Pot Savings Withdrawal via the Website

You will be able to apply for your Two Pot savings withdrawal via the [MIBFA website](#) only if

- ✓ you have successfully applied previously for your Two Pot savings withdrawal,
- ✓ a savings payment letter was issued for a previous Two Pot savings claim,
- ✓ you have a current Two Pot savings value of **R2000.00** or more, and
- ✓ **your details have not changed** since your last Two Pot savings claim.

Note, you may only apply for your Two Pot savings withdrawal **once per tax year**.
(A tax year runs from 1 March to 28 February).

First Time Login

If you are logging in for the first time, you will need to contact the MIBFA Call Centre on **0860 102 544** to activate your password.

Don't forget, the **Online Savings (Two Pot) Application via the Website Tutorial** is there to help you learn and understand this process.

Follow these steps to apply online

STEPS



Click on the **Benefit Statements & Two Pot Savings** button on the Home page



EXPLANATION

Click on the **Benefit Statements & Two Pot Savings** button on the Home page of the [MIBFA website](#) to access your Benefits Statements and Two Pot Savings Information.



STEPS



Log in to the **Member Portal** on the MIBFA website



EXPLANATION

You are required to log in to the **Member Portal** on the MIBFA website to view your Benefits Statements and Two Pot Savings Information.

Select the option to view your **Two Pot Savings Information**.

Enter your ID Number and password and click on the **Login** button.

*Remember, if you are logging in for the first time, you will need to contact the MIBFA Call Centre on **0860 102 544** to activate your password.*



View your Two Pot savings statement



A menu appears with selection items.

Click on the link displayed on the **Member Portal** screen to view your current **Savings Statements**.



View your Two Pot savings payment letter



Click on the link displayed on the **Member Portal** screen to view any **Payment Letters** you may have.

STEPS

EXPLANATION

Remember, you will only have a Payment Letter if you have previously applied for Two Pot savings withdrawal and your claim was successfully processed and paid.

TWO POT SAVINGS

Statement maybe password protected – password to open your statement is your ID number

Statements for the selected year is shown below:

Savings Statements - As at 2025
[2025-0011223344556-SURNAME NAME-1A02345.PDF](#)

[Click here to apply for your Two Pot Savings](#)

[Click here to view your Benefit Statements](#)

[Click here to view any Payment Letters you may have](#)

[Logout](#)



Apply for your Two Pot savings withdrawal



Click on the link displayed on the **Member Portal** screen to **apply for your Two Pot Savings**.

Note, this link will only be active if you qualify to apply for your Two Pot savings withdrawal via the website.

To qualify, you must have

- ✓ successfully applied previously,
- ✓ a current savings value of **R2000.00** or more, and
- ✓ a savings payment letter that was issued for a previous application.

*Remember, you may only apply for your Two Pot savings withdrawal **once per tax year**.*

TWO POT SAVINGS

Statement maybe password protected – password to open your statement is your ID number

Statements for the selected year is shown below:

Savings Statements - As at 2025
[2025-0011223344556-SURNAME NAME-1A02345.PDF](#)

[Click here to apply for your Two Pot Savings](#)

[Click here to view your Benefit Statements](#)

[Click here to view any Payment Letters you may have](#)

[Logout](#)



View your member information



Your details that are currently on record with MIBFA is displayed on the **Member Information** screen:

Fund, Firm Reference Number, Member Surname and Name, ID or Passport Number, Tax Reference Number, Bank Name, Bank Account Number, Bank Branch Code, Current Savings Value.

STEPS

EXPLANATION

TWO POT SAVINGS WITHDRAWAL APPLICATION

(No change in details since previous claim)

[Click here to go back to your Two Pot savings information](#)

Member Information
as at 31/03/2025

Fund	MIPF
Firm Reference Number	1A02345
Member Name	SURNAME NAME
ID/Passport Number	0011220041086
Tax Reference Number	0010203040
Bank Name	ABSA BANK
Bank Account Number	0102030405
Bank Branch Code	032005
Current Savings Value	2500.00

Confirm your cellphone number and email address, enter your details here

Cell Number	0823456789
Email Address	Test@gmail.com

Are the details displayed above, correct?

☒ Yes
☐ No

Have you been divorced since your last application?

☐ Yes
☒ No

Confirm the amount you want to withdraw, or enter your own amount here

Savings withdrawal amount R 2500.00

Your Declaration

You understand that the Fund will process your benefit, in terms of our payment instruction recorded above and according to the rules of the Fund, upon receipt of the required documentation. By clicking on the Accept button below, you confirm that:

1. You understand that all applications will be subject to an administration fee which will be deducted from the savings withdrawal value requested.
2. You understand that the withdrawal from your savings portion is subject to tax in terms of the **Income Tax Act** and will be deducted from the savings withdrawal amount requested.
3. All information on this form is correct and complete. This includes all banking and tax information. You understand that if there is any loss because of incorrect or incomplete information in this form, the Fund is not responsible for the losses.
4. You made the decision about the payment of your benefit voluntarily.
5. When we receive this application, we will process your benefit according to the rules of the fund. This includes losses in value of your investment and losses that occur because you may have to pay more tax than anticipated.

☒ Accept

[Logout](#)



Confirm your current Cell Number and Email Address



You are required to confirm your **Cell Number** and/or your **Email Address**.

Type your current cell number in on the form displayed on the **Member Information** screen.

Type your current email address in on the form displayed on the **Member Information** screen.

Confirm your cellphone number and email address, enter your details here

Cell Number	0823456789
Email Address	Test@gmail.com

STEPS



Confirm that your member information has not changed since your last application



EXPLANATION

You are required to confirm that your details displayed on the **Member Information** screen has not changed since your last Two Pot savings withdrawal application.

*Remember, you may only apply for your Two Pot savings withdrawal via the website if there is **no change** to your details since your last savings claim.*

Select the **Yes** button on the form displayed to confirm that your details are correct, or

Select the **No** button on the form displayed if your details have changed since your last Two Pot savings claim.

Note, if your details have changed, then you need to ask your Employer to assist you with your application.

Are the details displayed above, correct?

☒ Yes ☐ No



Confirm if you have been divorced since your last application



You are required to confirm if you have been divorced since your last Two Pot savings withdrawal application.

Select the **No** button on the form displayed if you have not been divorced since your last Two Pot savings claim, or

Select the **Yes** button on the form displayed if you have been divorced since your last Two Pot savings claim.

Note, if you have been divorced since your last claim, then you need to ask your Employer to assist you with your application.

Have you been divorced since your last application?

☐ Yes ☒ No



Confirm the amount you want to withdraw



You are required to confirm the amount you want to withdraw.

*Note, the **Savings Withdrawal Amount** displayed on the form is the same as your **Current Two Pot Savings Value** also displayed on the form.*

If you want to withdraw all of your current available Two Pot savings, do not change the **Savings Withdrawal Amount** displayed on the form, or

If you want to add your own amount to withdraw, then clear the amount displayed on the form and type in your own amount.

Remember, you may not withdraw less than R2000.00, or more than your current available Two Pot savings value.

Confirm the amount you want to withdraw, or enter your own amount here

Savings withdrawal amount R 2500.00

STEPS



Read and accept **Your Declaration**



EXPLANATION

You are required to carefully read and understand all the points under **Your Declaration**.

Select the **Accept** button on the form displayed to proceed with your savings claim.

*Note, you will not be allowed to submit your savings claim if you have not accepted **Your Declaration**.*

Your Declaration

You understand that the Fund will process your benefit, in terms of our payment instruction recorded above and according to the rules of the Fund, upon receipt of the required documentation. By clicking on the Accept button below, you confirm that:

1. You understand that all applications will be subject to an administration fee which will be deducted from the savings withdrawal value requested.
2. You understand that the withdrawal from your savings portion is subject to tax in terms of the **Income Tax Act** and will be deducted from the savings withdrawal amount requested.
3. All information on this form is correct and complete. This includes all banking and tax information. You understand that if there is any loss because of incorrect or incomplete information in this form, the Fund is not responsible for the losses.
4. You made the decision about the payment of your benefit voluntarily.
5. When we receive this application, we will process your benefit according to the rules of the fund. This includes losses in value of your investment and losses that occur because you may have to pay more tax than anticipated.

☒ Accept



Submit your savings claim



When you have checked and confirmed all the information on the **Member Information** screen, click on the **Submit Savings Claim** button to send your Two Pot savings withdrawal application to the Fund, or

If you do not want to proceed with your Two Pot savings claim, click on the **Cancel** button.



Log out from the Member Portal



Once you are done viewing your Two Pot savings information, click on the **Logout** button to close the **Member Portal** before you step away from the computer.

REMEMBER TO LOG OUT!