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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



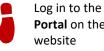
Click on the **Benefit** Statements & Two Pot Savings button on the Home page

EXPLANATION

Click on the **Benefit Statements & Two Pot Savings** button on the **Home** page of the <u>MIBFA website</u> to access your Benefits Statements and Two Pot Savings Information.



STEPS



Log in to the Member Portal on the MIBFA

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.

MEMBER PORTAL LOGIN			
Which statements would you like to access? Benefit Statements Two Pot Savings Information			
Please enter your ID number and password below to display your Benefit Statements or your current Two Pot savings information.			
ID Number:			
Password:			
Login			
BENEFIT STATEMENT QUERY FORM			
Click on the icon below to download.			
PDF Version			
"Please either phone or ask your HR to phone the MIBFA Call Centre (Tel: 0860 102 544) to obtain 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 you current Savings Statements.

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 Two Pot savings payment letter



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

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



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 mayb	e password protected - password to open your statement is your ID number
Statements for t	he selected year is shown below:
-	nents - As at 2025
2025-0011223	344556 – SURNAME NAME – 1A02345.PDF
<u>Click here to a</u>	pply for your Two Pot Savings
<u>Click here to vi</u>	ew your Benefit Statements
<u>Click here to vi</u>	iew 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.

MIBFA Managed Document

EXPLANATION

TWO POT SAVINGS	WITHDRAWAL APPLICATION
(No change in details since previous claim)	
<u>Click here to go back to your Two Pot savin</u>	ngs 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	632005
Current Savings Value	2500.00
Confirm your cellphone number and email addr	ress, enter vour details here
Cell Number	0823456789
Email Address	Test@gmail.com
Are the details displayed above, correct?	Yes
	O No
	Yes
Have you been divorced since your last applicat	I No
Confirm the amount you want to withdraw, or e	anter your own amount have
Savings withdrawal amount	R 2500.00
Your Declaration	
You understand that the Fund will process your recorded above and according to the rules of the documentation.By clicking on the Accept button	e Fund, upon receipt of the required
from the savings withdravial value reque 2. You understand that the withdrawal from Income Tax Act and will be deducted f 3. All information on this form is correct an You understand that if there is any loss the Fund is not responsible for the losse 4. You made the decision about the payme 5. When we receive this application, we will	n your savings portion is subject to tax in terms of the from the savings withdrawal amount requested. Id complete. This includes all banking and tax information because of incorrect or incomplete information in this form 5.
Accept	
-	
	Cancel Submit Savings Claim

i

Confirm your current Cell Number and Email Address

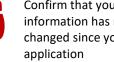
You are required to confirm your **Cell Number** and/or your **Email** Address.

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 add	ress, enter your details here
Cell Number	0823456789
Email Address	Test@gmail.com

STEPS



Confirm that your member information has not changed since your last

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.





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.





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:
 You understand that all applications will be subject to an administration fee which will be deducted from the savings withdrawal value requested. 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. 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. You made the decision about the payment of 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!