

User Input 26-05-2026 11:52

by [REDACTED]
[REDACTED]

Thinking - Update Requirement

Flow Executed 26-05-2026 11:53

Created attachment e58fd4be-2d2d-4c5c-929d-2388d3b4d3a8 from flow 'Compose Transfer Email'

Thinking - Update Requirement

Approval Required 26-05-2026 11:53

subject Section 14 Transfer In - [REDACTED]

recipients [REDACTED]

body Good day,

We are in receipt of the Section 14 transfer request for [REDACTED] from [REDACTED]

Attached please find the following:

- Transfer Out Form
- Application Form signed by client
- Copy of the client's ID

Should everything be in order, please arrange for the Form H to be completed and returned to us at your earliest convenience.

Kindly proceed with your standard processing and inform us should you require any additional information or documentation to complete the transfer.

Kind regards

attachments titles

- signed TRANSFER_OUT_2026-02-19_-_0446646176 [REDACTED] (1) (3) (33).pdf
- Retirement Annuity Plan Application Form (2) (3) (33).pdf
- ID - [REDACTED] (1) (1) (33).pdf

Please approve or request changes.

Thinking - Update Requirement

User Input 22:04

by [REDACTED]
Approved

User Input 22:04

by [REDACTED]
Approved

Flow Executed 26-05-2026 11:53

Created attachment 15ce85f9-11aa-41e1-acc-1fbc53970653 from flow 'Send Graph Email'

Thinking - Update Requirement

Input Requested 26-05-2026 11:53

Please upload the blank/unsigned Client Declaration document received from the coding provider

User Input 26-05-2026 11:54

by [REDACTED]

Transfer Letter blank.pdf

Thinking - Update Requirement

Thinking - Update Requirement

Input Requested 26-05-2026 11:54

Please upload the signed Client Declaration once it has been signed by the client.

User Input 26-05-2026 11:54

by [Redacted]

Transfer Letter (7) (5).pdf

Thinking - Update Requirement

Flow Executed 26-05-2026 11:55

Created attachment 7b1c9a00-4fb3-4ff1-8448-aac3be0697e3 from flow 'Transfer Document Parser'

Thinking - Execute Flow

Flow Executed 26-05-2026 11:55

Created attachment b27da241-2805-4aa6-bc14-88cddd2a1ca9 from flow 'Client Declaration Validator'

Thinking - Update Requirement

Flow Executed 26-05-2026 11:55

Created attachment dcd11de7-7212-4574-a82b-0354b6b225e9 from flow 'Compose Transfer Email'

Thinking - Update Requirement

Approval Required 26-05-2026 11:55

subject Section 14 Transfer In – Client Declaration Received – [Redacted]

[Redacted]

Please find attached the completed and signed client declaration for the above-mentioned Section 14 transfer.

- Signed Client Declaration

Kindly acknowledge receipt and advise when we can expect to receive the Form H.

Should you require any further information, please do not hesitate to contact us.

Kind regards

attachments titles Transfer Letter (7) (5).pdf

Please approve or request changes.

Thinking - Update Requirement

Flow Executed 26-05-2026 11:55

Created attachment bb53036e-cf6a-422b-8802-a2cae15705a8 from flow 'Send Graph Email'

Thinking - Update Requirement

Input Requested 26-05-2026 11:55

Please upload Form H received from the ceding provider.

User Input 22:04

by [Redacted]

Approved

User Input 26-05-2026 11:56

by [Redacted]

NSP Net - Form H (2).pdf

Form H (3).pdf

Thinking - Update Requirement

Input Requested

26-05-2026 11:56

Please provide the trustee distribution list email address(es) for the Form H trustee email.

User Input

26-05-2026 11:57

by [redacted]

Thinking - Execute Flow

Flow Executed

26-05-2026 11:57

Created attachment 0ec819b5-2e32-4840-ae8d-b2b87e988005 from flow 'Transfer Document Parser'

Thinking - Execute Flow

Flow Executed

26-05-2026 11:57

Created attachment 64dde750-dad1-4651-84e5-c408b0351077 from flow 'Compose Transfer Email'

Thinking - Update Requirement

Approval Required

26-05-2026 11:57

Please review the Form H trustee email below and approve or request changes.

subject Form H for Trustee Approval – Section 14 Transfer – [redacted]

recipients To: [redacted]

CC: [redacted]

body Good day,

Please find attached Form H for the above-mentioned Section 14 transfer for your review and signature.

Transfer details:

- **Client:** [redacted]
- **ID Number:** [redacted]
- **Ceding Provider:** [redacted]
- **Ceding Policy:** 044664617X6

Please sign and return at your earliest convenience.

Kind regards

- [redacted] Form H (3).pdf

Thinking - Update Requirement

Flow Executed

26-05-2026 11:58

Created attachment 2637e30b-b56e-4992-bdf6-d703641a71f7 from flow 'Send Graph Email'

Thinking - Update Requirement

Input Requested

26-05-2026 11:58

Please upload the signed Form H once the trustees have reviewed and signed it. I need that signed document to record trustee approval and send it back to the ceding provider.

User Input

26-05-2026 12:00

by [redacted]

Form H signed (2).pdf

Thinking - Update Requirement

Flow Executed 26-05-2026 12:00
Created attachment 56e71c11-de38-4750-a8c9-5454390c3cf7 from flow 'Compose Transfer Email'

Thinking - Update Requirement

Approval Required 26-05-2026 12:00
Please review the signed Form H return email below and approve or request changes.

subject Signed Form H – Section 14 Transfer – [REDACTED]

recipients

• To: [REDACTED]

body Good day,

Please find attached the signed Form H for the above-mentioned Section 14 transfer.

Kind regards

attachments titles

• [REDACTED] - Form H signed (2).pdf

User Input 22:04
by [REDACTED]
Approved

Thinking - Update Requirement

Flow Executed 26-05-2026 12:00
Created attachment 7d9946c1-4475-4e2f-aac7-8644a566ab0b from flow 'Send Graph Email'

Input Requested 26-05-2026 12:00
Please upload Form J received from the ceding provider.

User Input 26-05-2026 12:01
by [REDACTED]
[REDACTED] - Form J (1) (1).pdf

Thinking - Update Requirement

Flow Executed 26-05-2026 12:01
Created attachment 8b27b26d-d8ca-4324-a230-477339e82be9 from flow 'Transfer Document Parser'

Thinking - Execute Flow

Flow Executed 26-05-2026 12:01
Created attachment d981e687-1eb8-4e89-b645-2f3441540804 from flow 'Form J Validator'

Thinking - Update Requirement

by [REDACTED]
Approved

Flow Executed 26-05-2026 12:02
Created attachment 577f3fba-c27b-4958-87e1-c899bdf4b3a1 from flow 'Compose Transfer Email'

Thinking - Update Requirement

Approval Required

26-05-2026 12:02

Please review the Form J trustee email below and approve or request changes.

subject Form J for Trustee Approval – Section 14 Transfer – Daniel Stephanus Retief Nel

recipients To: [REDACTED]

CC: [REDACTED]

body Good day,

Please find attached Form J for the above-mentioned Section 14 transfer for your review and signature.

Transfer details:

- Client: [REDACTED]
- ID Number: [REDACTED]
- Ceding Provider: [REDACTED]
- Ceding Policy: [REDACTED]

Please sign and return at your earliest convenience.

Kind regards

attachments titles [REDACTED] - Form J (1) (1).pdf

Thinking - Update Requirement

Flow Executed

26-05-2026 12:03

Created attachment 6d979af0-9590-40e8-8931-6d36718d900f from flow 'Send Graph Email'

Thinking - Update Requirement

Input Requested

26-05-2026 12:03

Please upload the Form J signed by the trustees.

If there is also a Nil Tax Directive for this transfer, you can upload it after the signed Form J step is completed.

User Input

26-05-2026 12:03

by [REDACTED]

[REDACTED] - Form J signed 1 (1).pdf

Thinking - Update Requirement

User Input

22:04

by [REDACTED]

Approved

Flow Executed

26-05-2026 12:03

Created attachment 2d6d105b-d529-4597-9676-fd78a1aa9579 from flow 'Transfer Document Parser'

Thinking - Update Requirement

Input Requested

26-05-2026 12:04

Form J trustee sign-off has been recorded.

Please confirm one of the following so I can proceed to the final confirmation email:

1. Upload the Nil Tax Directive, if applicable for this transfer, or
2. Confirm that no Nil Tax Directive applies for this case.

If no Nil Tax Directive applies, I will proceed using only the signed Form J as the attachment.

User Input

26-05-2026 12:07

User Input

by [redacted]

[redacted] - Tax directive.pdf

Thinking - Update Requirement

Created attachment 91dd95dc-7b16-4fb6-b1f6-5b2762aa9eb0 from flow 'Compose Transfer Email'

Thinking - Update Requirement

Approval Required

26-05-2026 12:07

Please review the final confirmation email below.

subject Section 14 Transfer In – Transfer Complete – [redacted]

recipients [redacted]

body Good day,

We confirm receipt and validation of Form J for the above-mentioned Section 14 transfer.

The transfer has been successfully completed.

Transfer summary:

- **Client:** [redacted]
- **Ceding Provider:** [redacted]
- **Transfer Amount:** R[redacted]
- **Transfer Date:** [redacted] May 2026

Please find attached the relevant file(s).

Thank you for your cooperation throughout this process.

Kind regards

attachments titles

- [redacted] - Form J signed 1 (1).pdf
- [redacted] - Tax directive.pdf

Thinking - Update Requirement

User Input

22:04

by [redacted]

Approved

Flow Executed

26-05-2026 12:08

Created attachment bd4481c8-09f9-4830-af96-d49ee076aa84 from flow 'Send Graph Email'

Thinking - Update Requirement

Thinking - Execute Code

Thinking - Execute Code

Thinking - Execute Code

Thinking - Update Requirement

Approval Required

26-05-2026 12:11

Please review the audit pack below and approve if correct.

Thinking - Update Requirement

Input Requested

26-05-2026 12:11

Please provide the internal team email distribution list that should receive the closure notification. You can send one or more email addresses.

User Input

22:04

by [redacted]

Approved

User Input

26-05-2026 12:14

by [redacted]

[redacted]

Thinking - Update Requirement

Flow Executed

26-05-2026 12:14

Created attachment 4484ec9e-9131-4600-b6de-ab4065c4152b from flow 'Compose Transfer Email'

Approval Required

26-05-2026 12:14

Please review the internal closure email below and approve or request changes.

subject Transfer Closed – Section 14 Transfer – [redacted]

recipients To: [redacted]

body Good day,

Please be advised that the following Section 14 transfer has been completed and closed.

Transfer summary:

- Client: [redacted]
- ID Number: [redacted]
- Ceding Provider: [redacted]
- Transfer Amount: R [redacted]
- Transfer Date: [redacted] May 2026

The full audit summary has been reviewed and approved.

Kind regards

attachments titles None

Thinking - Update Requirement

Flow Executed

26-05-2026 12:15

Created attachment 358a0424-3ea0-4e57-8dda-9a3c25c10c3b from flow 'Send Graph Email'

Thinking - Update Requirement

Process Completed

26-05-2026 12:15