ANNEXURE A

APPLICATION FOR:

I) **EARLY RETIREMENT WITHOUT PENALISATION OF PENSION BENEFITS IN TERMS OF SECTION 16(6) OF THE PUBLIC SERVICE ACT, 1994, FOR EMPLOYEES AGED 55 TO 59 WITH AN ADDITIONAL FINANCIAL INCENTIVE CALCULATED AT TWO (2) WEEKS' OF BASIC SALARY PER YEAR FOR THE FIRST TWENTY (20) YEARS OF PENSIONABLE SERVICE; AND ONE (1) WEEK'S FINANCIAL INCENTIVE FOR EACH COMPLETED YEAR OF PENSIONABLE SERVICE THEREAFTER.**

II) **NORMAL RETIREMENT FINANCIAL INCENTIVE FOR EMPLOYEES AGED 60 TO 63 YEARS CALCULATED AT TWO (2) WEEK'S OF BASIC SALARY PER YEAR FOR THE FIRST TEN (10) YEARS OF PENSIONABLE SERVICE; AND ONE (1) WEEK'S FINANCIAL INCENTIVE FOR EACH COMPLETED YEAR OF PENSIONABLE SERVICE THEREAFTER.**

Approval of Early Retirement (ER) applications are not automatic, as each application must be considered on its own merit as well as contextual factors considered by each EA and availability of funding by National Treasury.

IN THE FINANCIAL YEAR 2025/2026

WHAT IS THE PURPOSE OF THIS FORM

NB: *This form must be completed after reading the* ***DETERMINATION AND DIRECTIVE ON EARLY RETIREMENT WITHOUT PENALISATION OF PENSION BENFITS; AND WITH FINANCIAL INCENTIVE FOR EMPLOYEES IN THE PUBLIC SERVICE***

To apply for early retirement without penalisation of pension benefits in terms of section 16(6) of the Public Service Act, 1994, for employees aged 55 to 59 with an additional financial incentive calculated at two (2) weeks' of basic salary per year for the first twenty (20) years of pensionable service; and one (1) week's financial incentive for each completed year of pensionable service thereafter. If you are between the age of 55 to 59 from 1 April 2025 - 31 March 2026.

Employees aged 60 to 63 do not qualify for Early Retirement in terms of Section 16(6) of the PSA but are encouraged to apply for a 'voluntary earlier exit' (normal retirement) in return for a financial incentive calculated at two (2) weeks' basic salary per year for the first ten (10) years of pensionable service and one week's financial incentive for each completed year of pensionable service thereafter. If you are between the age of 60 to 63 from 1 April 2025 - 31 March 2026.

This form must be used to apply for this dispensation by eligible employees. Only eligible employees who will fall within the qualifying age group during the qualifying period (1 April 2025 - 31 March 2026) may apply.

Please fill in all field in this form to assist with the approval process.

WHO SHOULD COMPLETE THIS FORM

Employees who qualify are those between the ages of 55- 59 years from 1 April 2025 - 31 March 2026 and wishing to voluntary apply for Early Retirement Programme (ERP) without penalisation of pension benefits in terms of section 16(6) of the Public Service Act, 1994, and a financial incentive calculated at two (2) weeks' basic salary per year for the first twenty (20) years of pensionable service and one (1) week's financial incentive for each completed year of pensionable service thereafter.

Employees who qualify are between the aged 60 to 63 years from 1 April 2025 - 31 March 2026 do not qualify for ERP in terms of Section 16(6) of the PSA but are encouraged to apply for a 'voluntary earlier exit' in return for a financial incentive calculated at two (2) weeks' basic salary per year for the first ten (10) years of pensionable service and one (1) week's financial incentive for each completed year of pensionable service thereafter.

ADDITIONAL INFORMATION

This form requires basic information. You are requested to furnish additional certified information to the GEPF on separate forms that are required once approval is granted.

SPECIAL NOTES

All information is required for decision making in terms of Public Service Regulation, 2016.
HR officers must provide applicants with ALL the necessary information to support applicants to make informed post-retirement decisions..

SECTION A: PERSONAL INFORMATION

PERSAL Number								Title					
Surname								Initials					
ID Number													
Race (X)	African		Coloured		Indian		White						
Gender (X)	Male		Female		Disability?	No		Yes					
Rank					Post Level								
Job Title					Salary Notch								

SECTION B: CONTACT DETAILS OF APPLICANT

Mobile										
Telephone (W)	Code	Telephone	Cell phone number							
Email										

SECTION C: PHYSICAL WORKSTATION LOCATION OF APPLICANT FOR EARLY RETIREMENT

Name of Department		National Department	Provincial Department
		☐	☐
Name of Province (if applicable)	Name of Region (if applicable)	Name of District (if applicable)	
Name of physical workstation: Institution/ office/unit			

SECTION D:

ELIGIBILITY CRITERIA FROM 55 – 59 YEARS (1 April 2025– 31 March 2026)

Date of preferred exit by applicant- qualifying age consideration	D	D	M	M	Y	Y	Y	Y

ELIGIBILITY CRITERIA FROM 60 – 63 YEARS (1 April 2025– 31 March 2026)

Date of preferred exit by applicant – qualifying age consideration	D	D	M	M	Y	Y	Y	Y

SECTION E: INFORMATION FOR CONSIDERATION OF APPLICATION

Employee age as at preferred date of exit from the Public Service	Y	Y	M	M	Service delivery needs taken into consideration (x)	Yes	No
Number of years of pensionable service at date of proposed exit	Y	Y	M	M	Do you have 15 years of actual service by the proposed date of exit? (For purpose of the post-retirement medical assistance (PRMA)) (X)	Yes	No
Have you simultaneously applied for ill health retirement (X)						Yes	No

SECTION F: EMPLOYEE MOTIVATION FOR CONSIDERATION (as per s16(6) provisions)

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EARLY RETIREMENT WITHOUT PENALISATION OF PENSION BENEFITS IN TERMS OF SECTION 16(6) OF THE PUBLIC SERVICE ACT, 1994, FOR EMPLOYEES AGED 55 TO 59 WITH AN ADDITIONAL FINANCIAL INCENTIVE CALCULATED AT TWO (2) WEEKS' OF BASIC SALARY PER YEAR FOR THE FIRST TWENTY (20) YEARS OF PENSIONABLE SERVICE; AND ONE (1) WEEK'S FINANCIAL INCENTIVE FOR EACH COMPLETED YEAR OF PENSIONABLE SERVICE THEREAFTER.

NORMAL RETIREMENT FINANCIAL INCENTIVE FOR EMPLOYEES AGED 60 TO 63 YEARS CALCULATED AT TWO (2) WEEK'S OF BASIC SALARY PER YEAR FOR THE FIRST TEN (10) YEARS OF PENSIONABLE SERVICE; AND ONE (1) WEEK'S FINANCIAL INCENTIVE FOR EACH COMPLETED YEAR OF PENSIONABLE SERVICE THEREAFTER.

ANNEXURE A

DECLARATION BY APPLICANT

1. I ____ (full names) hereby apply for (please tick box a or b)

a	Early Retirement Programme without penalisation and an incentive calculated at two (2) weeks' financial incentive for first (20) years of pensionable service; and one week's financial incentive for each completed year of pensionable service thereafter as **I am between the age of 55 to 59 from 1 April 2025 - 31 March 2026**

OR

b	A 'voluntary earlier exit' in return for an incentive calculated at two (2) weeks' financial incentive for the first ten (10) years of pensionable service and one week's financial incentive for each completed year of pensionable service thereafter as **I am between the age of 60 to 63 (not yet 64) in the period 1 April 2025 - 31 March 2026**

2. I understand that any incorrect or incomplete information supplied could lead to my application not being considered for approval.
3. The financial implications of my application were discussed with me by my HR/Finance section, and I understand the implications.
4. I understand Employees who have exited the service through the ERP are prohibited from re-employment in the public service in any capacity or level. Departments may however consider such applications for employment when the employee has served a minimum period of five (5) years after exiting the public service.
5. I understand that once my application has been approved by the final approval authority, I cannot retract my application.
6. I acknowledge that my application is subject to approval by the executive authority or his/her delegate and should my application be approved, I must exit from the public service as agreed

I declare that all the information provided (including any attachments) is complete and correct to the best of my knowledge and that I am eligible to apply for this provision.

Signature of applicant		Date	D	D	M	M	Y	Y	Y	Y

SECTION G: CONTACT DETAILS OF DIRECT LINE MANAGER/SUPERVISOR WHO IS DELEGATED TO SUPPORT THIS APPLICATION

<table>
<tr><td>Surname</td><td colspan="3"></td><td colspan="2">Name</td><td colspan="3"></td><td>Initials</td><td></td><td></td></tr>
<tr><td>Job Title</td><td colspan="6"></td><td colspan="2">Rank</td><td colspan="3"></td></tr>
<tr><td>Mobile</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Email</td><td colspan="11"></td></tr>
<tr><td colspan="3">Recommended</td><td colspan="2"></td><td colspan="5">Not Recommended</td><td colspan="2"></td></tr>
<tr><td>Signature</td><td colspan="4"></td><td colspan="3">Date</td><td colspan="4"></td></tr>
</table>

SECTION H: CONTACT DETAILS OF LINE MANAGER WHO IS DELEGATED TO RECOMMEND THIS APPLICATION

Surname			Name				Initials				
Job Title						Rank					
Mobile											
Email											
Supported				Not Supported							
Signature				Date							

SECTION I: CONTACT DETAILS OF DELEGATED AUTHORITY (eg HOD OR EA) WHO IS DELEGATED TO APPROVE THIS APPLICATION

Surname			Name				Initials				
Job Title						Rank					
Mobile											
Email											
Approved				Not Approved							
Signature				Date							