

IT'S BEEN A DUZI – A PENSION LAW ROUNDUP FOR 2006

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SURPLUS ISSUES - IMPROPER USE

- ❑ The Shell Determination
 - ❑ Retrospectivity
 - ❑ Selection
 - ❑ Cost
- ❑ The Sanlampensioenfonds Case

SURPLUS ISSUES - IMPROPER USE

- Amendments to legislation
 - Retrospectivity
 - Selection
 - Employer
 - Cost

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SURPLUS ISSUES – SECTION 15F EMPLOYER RESERVE ACCOUNT

- ❑ FSB: Reliance on Circular PF 105
- ❑ The Coca Cola Pension Fund Determination

SURPLUS ISSUES – THE REGISTAR’S POWERS

- Valuations
- Former members
- Interest
- Nil schemes

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SURPLUS ISSUES – THE REGISTAR’S POWERS

- Amendments to legislation
 - Interest
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SURPLUS – THE GHAVALAS TRIAL

- Background
- The surplus debate
- The allegations

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CONFLICT OF INTEREST

- Bulking
- Mes vs Art Medical Equipment Pension Fund
- Fidentia

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CONFLICT OF INTEREST

- Proposed Amendments
 - Registrars Powers
 - Administrators
 - Fund governance

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RETIREMENT FUND REFORM – LIFE INSURANCE INDUSTRY

- Statement of intent
- March 2006 – National Treasury Paper on contractual savings in the life insurance industry
 - Commission
 - Minimum benefits
 - Transferability
- Draft regulations in terms of Long Term Insurance Act and Pension Act

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Retirement Fund Reform – General

- ❑ February 2007 – Retirement Fund Reform Discussion Paper

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