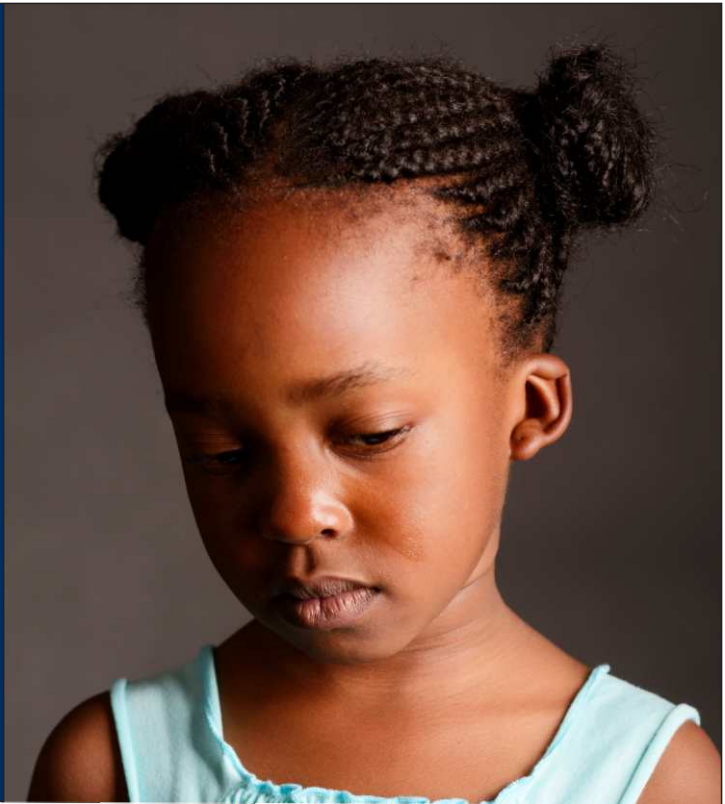


2021 Online workshops



Death Benefits II - The tricky bits

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AGENDA

- This interactive course is aimed at providing information and raising awareness about the trickier parts of section 37C and the disposal of lump sum death benefits by retirement funds. We deal with a number of court decisions and Financial Services Tribunal decisions in the course content. Some of the questions we look at include:
- Are advance/part payments permissible?
- When are dependants to be determined for the purpose of making a distribution?
- Are we required to know the life expectancy of a beneficiary?
- Which payments to a potential beneficiary by the deceased constitute an obligation to maintain and which are merely generosity?
- Can a nominee be an artificial person?
- If a member transfers to another fund, is his beneficiary nomination still valid?
- May the fund deduct investigation and paternity testing costs from a member's benefit?
- May the fund pay to a beneficiary's investment account?



Programme Supported by INSETA