

MEMBER INVESTMENT CHOICE SWITCH NOTIFICATION

LEGAL PROVIDENT FUND

Member details

E mail this form to zzswitches@aforbes.co.za or fax this form to Alexander Forbes on 011 263 2948.

Please complete your personal and contact details below:
Compulsory information - must be completed

Surname and Initials: _____	Date of Birth: _____
ID Number: _____ OR	Passport Number: _____
Cell Number: _____ AND/OR	Email Address: _____
Additional information to be completed	
Name of Employer: _____	Employee Number: _____
Tel Number: _____	Fax Number: _____
Member's Physical Address: _____	Member's Postal Address: _____
_____	_____

MEMBER INVESTMENT CHOICE

I choose Option 1 below

Option 1:

I wish to elect the LifeStage Model and I acknowledge and understand that at the date of the switch 100% of my existing retirement fund savings, i.e. my current Fund Credit and my Future Contributions to the Fund will be invested in the LifeStage Portfolio as follows:

MEMBER AGE	IS PERFORMER	IS REAL RETURN FOCUS	IS BANKER
Age 18 to 56	100%	-	-
Age 56 to 57	70%	30%	-
Age 57 to 58	60%	40%	
Age 58 to 59	50%	50%	
Age 59 to 60	40%	60%	
Age 60 to 61	30%	70%	
Age 61 to 62	20%	80%	
Age 62 to 63	10%	90%	
Age 63 to 64	-	90%	10%
Age 64 and older	-	67%	33%

I choose Option 2 below

OR

Option 2:

INVESTMENT PORTFOLIO
IS ACCELERATOR
IS PERFORMER
OASIS CRESCENT BALANCED HIGH EQUITY FUND OF FUNDS
IS REAL RETURN FOCUS
IS BANKER
TOTAL

"A" % Fund Credit	"B" % Future Contributions
100%	100%

DECLARATION BY MEMBER

I understand that a confirmation slip does not constitute sufficient proof of receipt by Alexander Forbes and that the onus is on me to ensure that the switch instruction is received by Alexander Forbes and if Alexander Forbes does not acknowledge receipt of the switch instruction within five working days, then the switch may not take place. I understand that should the form be incomplete or inaccurately completed (see "Important Notes" over the page), the switch instruction may not be actioned by Alexander Forbes. I will advise Alexander Forbes within 30 days of the switch instruction if the switch instruction has not been actioned as per my intention and advice (as per note 6 and 7). Any failure on my part to notify Alexander Forbes of any errors and /or omissions relating to my switch instruction within 30 days will be deemed acceptance by me. Should you have any queries, please contact the Alexander Forbes Switch help Line, on 0860 100 333.

I declare that I understand the risk profile of the investment portfolio/s of my choice and that I have obtained advice where appropriate.

I declare that I understand the implications of my choice. I indemnify the Fund, the Trustees, the Principal Officer of the Fund, my Employer and Alexander Forbes against any claim arising from my written instruction to switch my investment portfolio And the consequences thereof as set out in this Switch Notification Form (in particular, note 7).

Member Name: _____ Signature: _____ Date: _____

IMPORTANT NOTES:

1. Compulsory information, please complete surname and initials, date of birth, ID number or passport number, cell phone number, and or email address. Additional information is not mandatory but will assist as alternative modes for communication with the member.
2. Please refer to the options set out on the form above and ensure that the election is made in accordance with the options available to the Fund and its Specific Investment Portfolios. Please note that certain Investment Portfolios have specific rules, such as notice periods and maximum amounts, these rules rank the highest in terms of priority and apply over and above the Fund's switching rules.
3. If Option 2 is selected, please complete columns "A" and "B".
4. The Switch Notification Form will be processed within 5 working days after date of receipt, or, if applicable, any specific notice period relating to the Fund's Investment Portfolio/s.
5. The first switch in any calendar year will be free of charge. Thereafter a switch fee (R350 plus VAT) will be deducted from the member's current Fund Credit on completion of every switch.
6. Please view the result of the election change on Alexander Forbes (AF) Online, using the following address to connect to the [website: https://www.alexanderforbesonline.co.za](https://www.alexanderforbesonline.co.za). Alternatively, should you not have access, please call the AF Online help line on 0860 100 333 to assist in the registration process to gain access.
7. On viewing of the switch election change, it is important to check and ensure that the switch instruction has been actioned in accordance with your intention and advice. Please inform Alexander Forbes (0860 100 333) within 30 days should you have any queries. Any failure on your part to notify Alexander Forbes within 30 days of your switch instruction of any errors and /or omissions will be deemed acceptance by you and neither Alexander Forbes nor the fund will be liable for any resultant loss.
8. Alexander Forbes will maintain procedures for disaster recovery in the event of catastrophe. Alexander Forbes will have no liability for any loss that results directly or indirectly from a force majeure or from the lack of electricity supply or such other resources over which Alexander Forbes has no control.