

## Member investment choice switch - Generic

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**The purpose of this form is for you to instruct us where to place your investment.**

In this form:

- 'You' refers to the person named on this form as the member.
- 'We' and 'us' refer to the company in Alexander Forbes that is shown at the top of this form, who is also the administrator of your fund.
- 'Fund' refers to the fund that you are a member of.

### About new investments

You should get financial advice before you make these important decisions, in particular if you decide to choose your own investment portfolios. If you have any questions, you can contact Alexander Forbes (details at the top of this form). You can also ask us for brochures about the fund investments and the investment portfolios offered to members.

### Key points to understand about this form

You should sign the form only if you agree to all the terms and conditions in it. The form is part of your contract with us. You must make sure that all the information is correct and that all parts of the form are complete. We have the right to treat the information given in the form as accurate and complete. If you make changes to what you have already filled in, you must sign next to each change.

### Follow these steps

1. You need to fill out the form. You do have the option of filling in this form electronically and printing the electronic version of the form to be signed.
2. You must sign the form and date it.
3. Keep the first and second pages to refer to for any queries.
4. Please email the completed form to [zzswitches@forbes.co.za](mailto:zzswitches@forbes.co.za) or fax to **011 263 2948**. This form must not be sent to your human resources or payroll department at your employer.

## Protecting your information

For us to provide the service to you, you must give us the personal information we ask for in this form. We will process your personal information for valid and lawful reasons only.

It is the company in Alexander Forbes shown at the top of this form that is collecting and processing this information.

### Why we need your personal information

We collect your personal information in this form so that we can:

- pay your benefit from the fund or under the policy
- share it with a third party (who we contract with to provide services to you) so that we can provide services and products to you.

### Other parties that may get your personal information from us

We have the right to share your personal information with the following parties:

- regulators or government entities so that they can perform their duties to us
- our auditors so that they can perform their duties to us
- any person or organisation that has a legal right to access your information.

### Keeping your personal information safe and confidential

We will take care to keep your personal information safe and obey any legal requirements about protecting your personal information (for example the *Protection of Personal Information Act* when it becomes effective).

**We will keep your personal information confidential and will not share it except in the circumstances explained in this document. We will keep your personal information for as long as:**

- we need it to achieve the purposes set out above
- any law or contract requires us to keep the information
- the fund or insurer needs it for lawful purposes linked to its functions.

**Once we are no longer authorised to keep your information, we have the right to take any one or more of the following actions:**

- destroy the information
- delete the information
- de-identify the information.

We do not have to let you know when we take any of these actions.

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**Alexander Forbes is not responsible for any loss you or anyone else may suffer if important information is left out of this document.**

## How to contact us

If you want to ask us if we have your personal information, you can contact us at the telephone number shown at the top of the form. If your personal information is incorrect, we will change it if you make us aware of this.

### If you have a complaint

We would like to hear from you if you have a complaint:

- Visit us in person at any of our offices.
- Email [contactus@forbes.co.za](mailto:contactus@forbes.co.za).
- Phone 0860 000 279 or +27 (0)11 669 7026 if you're outside South Africa.
- Follow our complaints process at [www.alexanderforbes.co.za/contactus/complaints.aspx](http://www.alexanderforbes.co.za/contactus/complaints.aspx).

### If you need more information

Please contact us if you have any questions or if you need more information.

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## Member investment choice switch

Name of fund

LEGAL PROVIDENT FUND

### About your employer

Name of employer

Name of section, division or paypoint

### About you (the member)

Please fill in all the information in this section. If there are any changes to your personal particulars, please write to let us know.

#### Personal and contact details

Surname

First names

Maiden name

Title:  Dr  Mr  Mrs  Ms  Prof.  Other (specify)

ID or passport number

Country of issue Date of birth

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Employee number

#### Residential address (this is the address where you live most of the time)

Unit number

Complex

Street number

Street or farm name

Suburb

City or town

Country

Code

#### Postal address

Code

#### Contact details

Home number

Work number

Cell number

Email

## Investment portfolio options

There are two options for choosing your investment strategy:

- **The LifeStage Model**

The LifeStage Model can be invested in specialist, balanced or passive investment portfolios. The model has a set format for investing depending on how many years you have to normal retirement age.

- Your own choice of portfolios. This is a list of investment portfolios that you choose from.

You need to choose one of the following options. Details of these options are provided below.

### 1. The LifeStage Model

Tick this box to instruct us to invest 100% of the money in your fund credit and ongoing contributions in the LifeStage Model.

The normal retirement date is the date given in the special rules of your fund. To find out what it is, please refer to your member booklet or fund rules.

### 2. Your own choice of portfolios

Tick this box to invest your fund credit and ongoing contributions in the portfolios shown below. If you choose this option, you must make sure that you have received appropriate advice.

Indicate how you choose to invest by selecting from the options below. Then show how you divide the investment within that choice. Your choices must equal 100%.

Investment portfolio	"A"% Fund Credit				"B"% Ongoing Contribution			
				%				%
AFI Accelerator				%				%
AFI Banker				%				%
AFI Performer				%				%
AFI Real Return Focus				%				%
AFI Shari'ah High Growth				%				%
<b>TOTAL</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>%</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>%</b>

