

RETIREMENT FUND ADMINISTRATION

MEMBER INVESTMENT SELECTION FORM

This form must be completed by members who wish to make application to select their own investment portfolios or who wish to change the portfolios already selected. Members can select the investment portfolios in respect of their existing investments, and/or their future contributions (including transfer values to be received in future). This document serves as an official investment selection instruction to Sanlam Employee Benefits.

Member's personal details			
Name of Fund:			
Employer:		Member Number:	
Title and Initials:		Date of birth:	
Full Names and Surname:			
Employee number:		ID Number:	
Contact number(s):	Home:		Cell:
E-mail address:			

I agree to the following investment choice and switch terms and conditions:

1. Sanlam Employee Benefits will implement an investment instruction when they have received a completed application in the prescribed format, registered the member's request to make his or her own investment choice selections and have confirmed to the member receipt of the investment instruction form.
2. I understand that should the form be incomplete or inaccurately completed, the instruction may not be actioned by Sanlam Employee Benefits.
3. An investment instruction will be implemented within 5 working days of confirmation of receipt.
4. If I have not received a confirmation of receipt within 5 days, I must make enquiries, as my request may not have been received and processed.
5. Queries regarding the progress of an investment selection instruction must be directed to the call centre on Western Cape: 086 138 6202 or Gauteng: 086 122 3646
6. The fee for investment changes are determined by the Board of Trustees of the Fund from time to time.
7. If I switch from any smoothed bonus portfolios, the rules of the specific product will apply. In certain instances the disinvestment(s) may be done at the lower of market- and book value.

I hereby declare that:

1. I have taken financial advice or assert that I have a good understanding of investments and do not need the services of a financial adviser.
2. I understand the risks in selecting my own investment portfolios and am satisfied that my selection serves my needs.
3. I take full responsibility for my choices and hereby indemnify and undertake not to hold the Fund, the Board of Trustees or Sanlam Employee Benefits and its agents, directors, officers and any entity in the Sanlam Group of Companies responsible for any losses or any eventuality that may result from the investment portfolios I select.

Signed at _____ on _____ ccyy _____

Member's Signature

Financial adviser particulars

Initials and surname:			
FAIS license number:		Office telephone number:	
E-mail address:		Cell phone number:	

Please note: If you have completed this form electronically, kindly print and sign the form before returning it to Sanlam. Please e-mail the completed form to switch.south@sanlam.co.za.

I hereby make application to make my own investment choice and ask that my **existing investments** (current member share) as well as my **future contributions** (including transfer values to be received in future by Sanlam) be invested in the Lifestage Programme:

LIFESTAGE OPTION	
Lifestage Programme (100%)	

OR

I hereby make application to make my own investment choice and ask that my **existing investments** (current member share) be invested as follows (choose one of the following two options):

Current member share

Option 1	
Retain current investment portfolios	

OR

Option 2	
Switch the investment portfolios of my current member share to the following portfolios (<i>complete the details below</i>)	
Portfolios	%
Income Fund - Portfolio A	
Smoothed Bonus Fund - Portfolio B	
Balanced Fund - Portfolio C	
Shari'ah Fund - Portfolio D	
Total	100%

I hereby make application to make my own investment choice and ask that my **future monthly contributions** (including transfer values to be received in future by Sanlam) (current member share) be invested as follows (choose one of the following two options):

Future monthly contributions

Option 1	
Retain current investment portfolios	

OR

Option 2	
Switch the investment portfolios of my future monthly contributions to the following portfolios <i>(complete the details below)</i> :	
Portfolios	%
Income Fund - Portfolio A	
Smoothed Bonus Fund - Portfolio B	
Balanced Fund - Portfolio C	
Shari'ah Fund - Portfolio D	
Total	100%

Information relating to the portfolios on the investment choice menu, their performance and any amendments thereto can be obtained from the Fund's website or the employer's Human Resources office.

Member
quick access
self-service



Get in touch with your retirement information

Sanlam's member self-service options on the Website and the free Mobile App provide easy and quick access to important information regarding your retirement savings and benefits. You are also able to submit your requests via the Web or App.

Go to <https://cp.sanlam.co.za/> to register or contact your employer for assistance.