



Member investment choice switch

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 Alexforbes 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 Alexforbes (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@alexforbes.com or fax to **011 263 2948**. This form must not be sent to your human resources or payroll department at your employer.

Personal information, privacy and security

FIND OUT how we protect your personal information, privacy and security.

Alexforbes 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@alexforbes.com.
- Phone 0860 000 279 or +27 (0)11 669 7026 if you're outside South Africa.
- Follow our complaints process at www.alexforbes.co.za/contactus/complaints.aspx.

If you need more information

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

Member investment choice switch

Name of fund

University of South Africa Retirement 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 ☐ Prof ☐ Dr ☐ Mr ☐ Mrs ☐ Ms ☐ Other (specify)

ID or passport number

Country of issue

Date of birth

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

Two-Pot Retirement System

Your investment strategy options remain unchanged effective 1 September 2024.
Any investment portfolio you choose will be applied to the savings, vested and retirement pots.
Any investment portfolio switch you make will be effective for all three pots.

There are two options for choosing your investment strategy:

- Option 1 – Nominate your intended retirement age (main and supplementary account)**
Only complete this section if you wish to invest both your main and supplementary accounts according to the LifeStage model, but want to nominate your intended retirement age. If you are currently an own choice member and you want to revert back to the LifeStage model, please complete this section.

I wish to nominate my intended retirement age as (tick appropriate box):

☐ 55 years

☐ 60 years

☐ 65 years

- Option 2 – Own choice portfolio**
Only complete this section if you wish to follow an own choice investment strategy (for both main and supplementary accounts).
Please note that if you are entitled to a minimum retirement benefit from the Fund, you forfeit this right when you elect an own choice portfolio.

Investment portfolio

Investment portfolio	Main and supplementary accounts	
	% Fund credit	% Future contributions
UNISARF Inflation Target portfolio (UL)		
UNISARF Stable portfolio (UL)		
UNISARF Income Protection portfolio (UL)		
UNISARF Shari'ah portfolio (UL)		
Total (must add up to 100%)	100%	100%

*The supplementary account comprises of your post-retirement medical aid contributions, additional voluntary contributions and any other amounts as details in the Rules of the Fund.

Initial here