



# WOOLWORTHS GROUP RETIREMENT FUND

MAKING THE DIFFERENCE TO YOUR RETIREMENT

## MEMBER INVESTMENT CHOICE SWITCHING FORM

Email this completed form to [zzswitches@alexforbes.com](mailto:zzswitches@alexforbes.com) or fax it to **011 263 2948**.

Surname																																					
First Name(s)																																					
Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Other (specify)																																	
Employee No.						Store/Branch																															
Section, Division or Paypoint																																					
Work Tel No.	0																		Cell No.	0																	
Email																																					
ID No. / SA Passport No.																Date of Birth	D	D	M	M	Y	Y	Y	Y													
Postal Address																																					
																										Postal code											

### GET FINANCIAL ADVICE BEFORE YOU MAKE THESE IMPORTANT INVESTMENT DECISIONS

**AUTOMATIC LIFE STAGE** is the Fund's default investment option and is suitable for most members of the Fund. It is an appropriate long-term investment strategy that invests your retirement savings according to your age. It is for members who do not wish to be actively involved in managing their own investments.

**OWN INVESTMENT CHOICE** allows you to decide in which portfolios you want to invest. Here you are entirely responsible for any switches and movements. If choosing this option, we assume that you have consulted a qualified financial adviser to confirm the appropriateness of your choice.

If you have any questions, contact the Alexforbes Individual Advice Centre (IAC).  
Call **0860 100 444** or email [iac@alexforbes.com](mailto:iac@alexforbes.com)

### IMPORTANT NOTES

1. Your switching instruction **should be processed within 5 working days** of receipt.
2. You should receive a switch confirmation (by sms or email) from the Fund's administrator confirming that your instruction was implemented. **If you do not receive a confirmation within five working days, please contact Alexforbes on 011 324 3401.**
3. You can log in and view your investment allocation on [online.alexanderforbes.co.za](http://online.alexanderforbes.co.za)

# YOUR NEW INVESTMENT ALLOCATION

You need to choose one of these two options. Please tick the appropriate boxes below.

- **AUTOMATIC LIFE STAGE** option will automatically adjust your investment strategy according to how many years you have until normal retirement age.
- **OWN INVESTMENT CHOICE** allows you to select your own choice of investment portfolios. There are four portfolios to which you can allocate a percentage of your Fund Credit and ongoing contributions. Your percentages must total 100%.

## AUTOMATIC LIFE STAGE

Tick this box to instruct us to invest 100% of the money in your Fund Credit and ongoing contributions into the **Automatic Life Stage** option.

## OWN INVESTMENT CHOICE

Tick this box to invest your Fund Credit and ongoing contributions in the portfolios shown below.

- **Your percentages must total 100%.**
- Ensure that you have received appropriate financial advice before selecting this option.
- Indicate how you choose to invest by selecting from the options below.
- Allocate a percentage of your investment within that choice.

### PERCENTAGE

**Balanced Growth Portfolio**

   %

**Conservative Growth Portfolio**

   %

**Banker Portfolio**

   %

**Shari'ah Portfolio**

   %

**Total**

   %

## YOUR DECLARATION

### By signing this form:

- I confirm that I understand the contents of this form and agree with the terms and conditions.
- I understand the risk profile of the investments I have chosen, and the consequences of my choices.
- I have received financial advice (where appropriate) if choosing the OWN INVESTMENT CHOICE option.
- A fax confirmation or email delivery receipt does not constitute sufficient proof of receipt by Alexforbes.

**I declare that I understand the implications of my choice. I indemnify the Fund, the Trustees and the Principal Officer of the Fund, my Employer and Alexander Forbes Financial Services against any claim whatsoever arising from my investment portfolio choice.**

**Your Full Name**

**Your Signature**

**Date**