

Member Investment Choice Switch Form: Living Annuitant

Section 1: Member Details (Compulsory, this form will not be implemented if not fully completed)

Momentum Retirement Administrator's reference

Title Initial(s) First name

Surname

Date of birth -

RSA ID Yes ☐ No ☐ ID/passport number

Attach a copy of ID/passport (if you have an identity card, please submit a copy of the front and back of the card).

Passport country of origin

Postal address

Unit number Complex (if applicable)

Street number Street/farm name

Suburb/district

City/town Postal code

Telephone (Business) Home phone number

Mobile Number

Email address

Section 2: New Investment Allocation

Section 2.1: Individualised investment choice

Please note that all your savings, retirement and vested components will be switched according to your investment election.

I herewith instruct the Administrator of the Fund to switch my current Fund Credit to the Portfolios in accordance with the percentages indicated below.

Switch my current FUND CREDIT TO:

INVESTMENT PORTFOLIO*	%
Long Term Capital	
Stable Portfolio	
Shari'ah Portfolio	
Money Market Portfolio	
TOTAL	100%

IMPORTANT NOTES

- * This instruction WILL NOT BE IMPLEMENTED IF BOTH INSTRUCTIONS ARE NOT COMPLETED AND DO NOT ADD UP TO 100%.
- Please note that your contractual retirement age is determined by your employment conditions. This means that if you choose the Life StageInvestment Model 65, but your retirement age is 60, your Employer may force you to retire at age 60. Members should be aware that choosing a Life Stage Investment Model with an older retirement age than what the Employer has specified, means that they will be following a more risky investment strategy, albeit one with an expected higher investment return (but not so guaranteed).
- Your switching instruction should be e-mailed to **NTRF@momentum.co.za**. The Administrator will assess the instruction for completeness. The switch will be process within 5 business days. You will receive a notification confirming that your investment option(s) was implemented. If you do not receive confirmation or have any enquires in this respect, please contact the Administrator on **0860000071**.
- On viewing of the switch election change, it is important to check and ensure that the switch instruction has been implemented in accordance with your intention and advice. Please inform the Administrator on **0860000071** within 30 days should you have any queries.
- The Administrator will maintain procedures for disaster recovery in the event of catastrophe. The Administrator 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 the Administrator has no control.

Section 3: Protecting your information

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

1. **Why we need your personal information**
We collect your personal information in this form so that we can identify who you are and that your information corresponds to that which the Fund holds on record for you.

- 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.

2. **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 (in terms of the Protection of Personal Information Act).
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 purpose 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 of the following actions:

- Destroy the information
- Delete the information
- De-identify the information

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

Section 4: Declaration

I, (full names)

A fax confirmation slip does not constitute sufficient proof of receipt by the Administrator. I understand that the onus is on me to ensure that the investment switch instruction is received by the Administrator and if the Administrator does not acknowledge receipt of the investment switch instruction within five working days, then the investment switch will not be implemented.

I understand that should the form be incomplete or inaccurately completed (refer to "Important Notes" above), the investment switching instruction may not be implemented by the Administrator. I will advise the Administrator within 30 days if the investment switching instruction has not been implemented as per my intention and advice. Any failure on my part to notify the Administrator of any errors and/or omissions relating to my investment switch instruction within 30 days will be deemed acceptance by me. Should you have any queries, please contact the Administrator on **0860000071** or alternatively via **ntrf@momentum.co.za**.

I declare that I understand the risk profile of the investment Portfolio(s) of my investment choice and that I have obtained advice where appropriate. I declare that I understand the implications of my investment choice. I indemnify the Fund, the Trustees, the Principal Officer of the Fund, my Employer and the Administrator against any claim arising from my written instruction to switch my investment Portfolio as specified on the reverse side of this investment switching form.

Member's surname

Initial(s)

Member's signature

Place

Date

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