

## 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 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.com](mailto:zzswitches@forbes.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

Alexander Forbes takes data protection seriously. We comply with legislation that protects data and personal information like the *Protection of Personal Information Act*.

By signing this document, you confirm that you have the necessary permission to provide us with personal or special information about other people or children if required.

### We will keep your personal information or share it with third parties to:

- act on your instructions for as long as we, or the fund, need to
- comply with any law that requires it communicate with you about our services and products where appropriate

Once we **no longer have a need or legal basis to keep your personal information**, we will:

- delete it, or
- remove the personal information that identifies you

Please contact us using the details provided to **update or correct your personal information**.

If you believe that we have not complied with data protection laws in handling your personal information, you undertake to resolve any concerns with Alexander Forbes. If you are not satisfied with the outcome of this process, you may lodge a complaint with the Information Regulator using the complaints email address:

**Complaints email:** [complaints.ir@justice.gov.za](mailto:complaints.ir@justice.gov.za)  
**Website:** <https://www.justice.gov.za/inforeg>

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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.com](mailto:contactus@forbes.com).
- 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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**Institutional Funds Administration**

Alexander Forbes, 115 West Street, Sandton, 2196  
 PO Box 787240, Sandton, 2146  
 Telephone: 0860 100 333 | Fax: +27 (0)11 263 2948  
 Email: zzswitches@aforbes.com  
 Website: www.alexanderforbes.co.za

## Member investment choice switch

Name of fund

Cape Peninsula University of Technology 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

There are two options for choosing your investment strategy:

- **The LifeStage Model**

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
27 Four Shari’ah Multi Managed Balanced	%	%
Allan Gray Life Global Balanced (RRF) Portfolio - LGBRRF	%	%
Allan Gray Life Global Stable Fund (UL)	%	%
Coronation Inflation Plus Fund	%	%
Coronation Houseview Portfolio	%	%
CPUT RF (Cautious Managed)	%	%
Ninety One (General Equity) Balanced Fund	%	%
Ninety One Money Fund	%	%
<b>Total</b>	<b>1 0 0 %</b>	<b>1 0 0 %</b>

