



De Beers Pension Fund

DC17: Member Investment Choice – Portfolio switch form

To be completed when a member wishes to switch his/her Fund Credit and future contributions from his/her existing portfolio to another portfolio.
Please note: You may **not make** any alterations or use correction fluid on this form

PORTFOLIO SWITCH FORM

To: Barbara Jansen
Fax no: 053 – 807 3500
E-mail: Barbara.jansen@dbpf.co.za

Important:

After faxing the form to the above number or scanning and emailing it, please send your original form to the Fund by posting it to the De Beers Pension Fund at PO Box 1922, Kimberley, 8300

Please complete all the information required below. All fields are mandatory and incomplete forms will not be processed.			
Surname		Initials	
Date of birth		RSA Identity number	
Passport number (if no identity number)		If passport, place of issue	
Telephone number (w)		Telephone number (h)	
Fax number		Cell number	
E-mail address		Member number	
Physical address			
		Postal code	
Postal address			
		Postal code	

INVESTMENT OPTION – PLEASE SELECT EITHER OPTION 1 OR 2 BELOW

<p>OPTION 1: SWITCH OUT OF DEFAULT LIFE STAGE PORTFOLIO</p> <p><i>By selecting to move out of the default life stage portfolio, you will no longer form part of the automated process in terms of where your fund credit is automatically invested in the default life stage portfolio for your age as appropriate. You will therefore remain in the portfolio selected by you at this point until you elect otherwise by completing and submitting a portfolio switch form to the Fund.</i></p> <p><i>Please indicate the portfolio where you want your FUND CREDIT and future contributions to be invested in. CHOOSE ONE OF THE FOLLOWING:</i></p>	<input type="checkbox"/>
I choose to switch my Fund Credit and invest my future contributions in portfolio A (High Equity)	
I choose to switch my Fund Credit and invest my future contributions in portfolio B (Medium/High Equity)	
I choose to switch my Fund Credit and invest my future contributions in portfolio C (Medium Equity)	
I choose to switch my Fund Credit and invest my future contributions in portfolio D (Medium/Low Equity)	
I choose to switch my Fund Credit and invest my future contributions in portfolio E (Low Equity)	
I choose to switch my Fund Credit and invest my future contributions in the Cash Only portfolio	

OR

Please initial

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<p>OPTION 2: SWITCH BACK TO DEFAULT LIFE STAGE PORTFOLIO AS PER THE LIFE STAGE INVESTMENT MODEL</p> <p><i>By selecting this option, your Fund credit and future contributions will be invested in the appropriate default life stage portfolio per the life stage investment model in accordance with your age.</i></p>	<input type="checkbox"/>
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Notes:

- Your Fund Credit will be switched out of your existing portfolio and into the portfolio of your choice or default life stage portfolio within five (5) working days of the Fund having received your instruction for the switch.
- Please ensure that you receive confirmation from the Fund of your instruction to switch portfolio and follow up should such confirmation not be received within ten (10) working days from the date you faxed or emailed your portfolio switch form to the Fund. The onus is on you to confirm that the switch form has been received and actioned by the Fund.
- The Fund will send you an sms (provided that a valid cell number has been provided above) to confirm your portfolio switch and this will be followed by written confirmation.
- You are allowed three (3) free voluntary portfolio switches within any financial year (March to February), after which a switching fee of R1 000 per switch will apply.

I confirm that I have read the contents of the member guide relating to investment choice and confirm that the portfolio switch requested above is entirely my own choice. I declare that I understand the risk profile of the investment portfolio of my choice. I authorise the Trustees to invest my FUND CREDIT and future contributions made after the exercising of such selection into the portfolio of my choice as indicated above. I have taken note of the Trustees' advice to seek professional advice from a Certified Financial Planner to assist me with this decision. I confirm that I accept that the Fund cannot be held liable for any inappropriate advice taken and/or inappropriate election made by me: I therefore accordingly indemnify the De Beers Pension Fund from any liability in relation to such advice taken by me from a third party of my choice as well as my request to switch portfolios.

Member's signature	
Date	

The information disclosed in this document will be treated as confidential and will only be used for the purposes for which it is intended in terms of applicable legislation. The De Beers Pension Fund (the Fund) has accordingly developed a Privacy Policy which covers how the Fund collects, uses, discloses, transfers, and stores members' personal information. Please visit the Fund's website to view the Privacy Policy should you require additional information