



When must this form be completed?

This form should be completed when a member wants to switch their Fund Credit and future contributions from their existing portfolio to another portfolio.

Email your completed form to pensionpost@dbpf.co.za or fax to 053 807 3500

ALL FIELDS MUST BE COMPLETED. INCOMPLETE FORMS WILL NOT BE PROCESSED.
Do not make any alterations to this form.

PLEASE NOTE: Your Fund credit is the total of your vested annuity pot, vested lump sum pot (if applicable), savings pot and retirement pot.

SECTION A: MEMBER'S DETAILS (MEMBER TO COMPLETE)

Initials		Surname				
Identity number			Date of birth			
Passport number (for non-RSA residents)		Country of issue				
Member number						
Contact details:	Home		Work		Cell	
Email address						
<i>* Where an email address is supplied, all Fund communication will be directed to the email address supplied.</i>						
Postal address					Code	
Physical address					Code	

SECTION B: INVESTMENT OPTION – PLEASE SELECT OPTION 1 OR 2

OPTION 1: SWITCH OUT OF DEFAULT LIFE-STAGE PORTFOLIO

By selecting to move out of the default life-stage portfolio, you will no longer be part of the automated process where your Fund Credit is automatically invested in the default life-stage portfolio for your age. You will remain in the portfolio selected by you until you elect otherwise by completing and submitting another portfolio switch form to the Fund.

Please select ONE of the following portfolios where you want your Fund Credit and future contributions to be invested:

Portfolio A (High Equity)

Portfolio B (Medium/High Equity)

Portfolio C (Medium Equity)

Portfolio D (Medium/Low Equity)

Portfolio E (Low Equity)

Cash Only portfolio

OPTION 2: SWITCH BACK TO THE DEFAULT LIFE-STAGE PORTFOLIO AS PER THE LIFE-STAGE INVESTMENT MODEL

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.

Notes:

- Your Fund Credit will be switched out of your existing portfolio **within five (5) working days** of the Fund receiving this form.
- Please ensure that you receive confirmation from the Fund of your instruction to switch portfolio and follow up if no confirmation has been received within ten (10) working days of submission 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 per financial year (March to February), after which a switching fee of R1 000 per switch will apply.

SECTION C: DECLARATION BY MEMBER

I confirm that I have read the contents of the member guide relating to investment choice and confirm that the portfolio switch request above is entirely my own choice. I understand the risk profile of the investment portfolio of my choice. I authorise the Trustees to invest my FUND CREDIT and future contributions 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 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 advice I take 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