



**De Beers Pension Fund**

**DC 8.3: MIC – Portfolio switch form – Living Annuity Pensioners**

To be completed when a member wishes to switch his Living annuity capital from his/her existing investment portfolio to another portfolio

**PORTFOLIO SWITCH FORM**

**To: Wendy Chan Yan**  
**Fax no: 053 – 807 3500**  
**E-mail: wendy.chanyan@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 or sending it via Docex 12.

**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)	
Member number:		Cell number	
Email address:			
Physical address:			Postal code:
Postal address:			Postal code:

**INVESTMENT OPTION – LIVING ANNUITY CAPITAL**

Please indicate the portfolio where you wish your Living annuity capital to be invested. Place an X in the appropriate box. CHOOSE ONLY ONE OF THE FOLLOWING:

I choose to switch my living annuity capital in portfolio A (High Equity)	
I choose to switch my living annuity capital in portfolio B (Medium/High Equity)	
I choose to switch my living annuity capital in portfolio C (Medium Equity)	
I choose to switch my living annuity capital in portfolio D (Medium/Low Equity)	
I choose to switch my living annuity capital in portfolio E (Low Equity)	
I choose to switch my living annuity capital in the Cash Only portfolio	

**Notes:**

- Your living annuity capital will be switched out of your existing portfolio and into the portfolio of your choice 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 change investment options and follow up should such confirmation not be received within ten (10) working days from the date you faxed or emailed your form to the Fund. The Fund will send you a sms (provided that a valid cell number has been indicated above) to confirm the switch and this will be followed up by written confirmation as well.
- You are allowed three (3) free voluntary 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 LIVING ANNUITY CAPITAL 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.**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_