



WOOLWORTHS GROUP RETIREMENT FUND

MAKING THE DIFFERENCE TO YOUR RETIREMENT

MEMBER INVESTMENT CHOICE SWITCHING FORM

Email this completed form to Alexander Forbes at zzswitches@aforbes.com or fax to **011 263 2948**

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---------------|---|---|---|---|---|---|--------------|---|----------|---|--|--|---------|---|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| Name | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Employee No. | | | | | | | Store/Branch | | | | | | | | | | | | | | | | | | | | | | |
| ID Number | | | | | | | | | | | | | Tel No. | 0 | | | | | | | | | | | | | | | |
| Date of Birth | D | D | M | M | Y | Y | Y | Y | Cell No. | 0 | | | | | | | | | | | | | | | | | | | |
| Email | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

NEW INVESTMENT ALLOCATION Please switch my current Fund Credit from the Investment Portfolio indicated in column A below to the Investment Portfolio in column B. Please tick the boxes.

| FROM Investment Portfolio (column A) | TO Investment Portfolio (column B) |
|---|---|
| AUTOMATIC LIFE STAGE: <input type="checkbox"/> | AUTOMATIC LIFE STAGE: <input type="checkbox"/> |
| LIFE STAGE CHOICE: | LIFE STAGE CHOICE: |
| Woolworths High Growth Portfolio <input type="checkbox"/> | Woolworths High Growth Portfolio <input type="checkbox"/> |
| Woolworths Growth Portfolio <input type="checkbox"/> | Woolworths Growth Portfolio <input type="checkbox"/> |
| Woolworths Medium Growth Portfolio <input type="checkbox"/> | Woolworths Medium Growth Portfolio <input type="checkbox"/> |
| Woolworths Medium Conservative Portfolio <input type="checkbox"/> | Woolworths Medium Conservative Portfolio <input type="checkbox"/> |
| Woolworths Conservative Portfolio <input type="checkbox"/> | Woolworths Conservative Portfolio <input type="checkbox"/> |
| Woolworths Stable Portfolio <input type="checkbox"/> | Woolworths Stable Portfolio <input type="checkbox"/> |
| Woolworths Cash Portfolio <input type="checkbox"/> | Woolworths Cash Portfolio <input type="checkbox"/> |
| Woolworths Shari'ah Portfolio <input type="checkbox"/> | Woolworths Shari'ah Portfolio <input type="checkbox"/> |
| Woolworths Final Year Portfolio <input type="checkbox"/> | Woolworths Final Year Portfolio <input type="checkbox"/> |

IMPORTANT NOTES

- Your switching instruction will be processed within **5 working days** after date of receipt.
- You will receive a switch confirmation certificate from the administrator confirming that your change was implemented. If you do not receive a certificate, please contact Alexander Forbes on **011 324 3401**.

DECLARATION

A fax confirmation or email delivery receipt does not constitute sufficient proof of receipt by Alexander Forbes. I understand that the onus is on me to ensure that the switch instruction is received by Alexander Forbes and that if Alexander Forbes does not acknowledge receipt of the switch instruction within 5 days, then the switch may not take place. I understand that should the form be incomplete or inaccurately completed, the switching instruction may not be actioned by Alexander Forbes.

I declare that I understand the risk profile of the investment portfolio of my choice and that I have obtained financial advice in this regard on the following date:

I declare that I understand the implications of my choice. I indemnify the Fund, the Trustees and the Principal Officer of the Fund, my Employer and Alexander Forbes Financial Services against any claim whatsoever arising from my investment portfolio choice.

| | | | |
|---------------------------|----------------------|-------------|---------------------------------------|
| Employee Signature | <input type="text"/> | Date | <input type="text" value="DDMMYYYY"/> |
|---------------------------|----------------------|-------------|---------------------------------------|