



WOOLWORTHS GROUP RETIREMENT FUND

MAKING THE DIFFERENCE TO YOUR RETIREMENT

MEMBER INVESTMENT CHOICE SWITCHING FORM

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

Surname																															
First Name(s)																															
Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Other (specify)																											
Employee No.						Store/Branch																									
Section, Division or Paypoint																															
Work Tel No.	0						Cell No.	0																							
Email																															
ID No. / SA Passport No.																Date of Birth	D	D	M	M	Y	Y	Y	Y							
Postal Address																															
																										Postal code					

GET FINANCIAL ADVICE BEFORE YOU MAKE THESE IMPORTANT INVESTMENT DECISIONS

The Automatic Life Stage is an appropriate long-term investment strategy for members with a moderate risk profile, and **is suitable for most members of the Fund** who do not wish to be actively involved in managing their own investments.

The Member Investment Choice is for members who believe the Automatic Life Stage is inappropriate for their particular financial planning needs. We assume that you are well informed if making this choice and have consulted a certified financial adviser to confirm the appropriateness of your choice in matching your financial planning needs.

If you have any questions, contact the Alexander Forbes Alexander Forbes Individual Advice Centre (IAC):

Tel: 0860 100 444 or **Email: iac@aforbes.com**

IMPORTANT NOTES

1. Your switching instruction **should be processed within 5 working days** of receipt.
2. You should receive a switch confirmation (by sms or email) from the Fund’s administrator confirming that your instruction was implemented. **If you do not receive a confirmation within five working days, please contact Alexander Forbes on 011 324 3401.**
3. You can view your investment allocation on online.alexanderforbes.co.za

YOUR NEW INVESTMENT ALLOCATION

PLEASE SWITCH my current fund credit from the investment portfolio indicated in **column A** **TO** the investment portfolio indicated in **column B**. Please tick the appropriate boxes.

FROM INVESTMENT PORTFOLIO (COLUMN A)		TO INVESTMENT PORTFOLIO (COLUMN B)
AUTOMATIC LIFE STAGE <input type="checkbox"/>		AUTOMATIC LIFE STAGE <input type="checkbox"/>
MEMBER INVESTMENT CHOICE		MEMBER INVESTMENT 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"/>

YOUR DECLARATION

By signing this form:

- I confirm that I understand the contents of this form and agree with the terms and conditions.
- I understand the risk profile of the investments I have chosen, and the consequences of my choices.
- I have received financial advice (where appropriate) if choosing the Member Investment Choice option.
- A fax confirmation or email delivery receipt does not constitute sufficient proof of receipt by Alexander Forbes.

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.

Your Full Name

Your Signature

Date