

Member investment selection form - deferred pensioners/phased retirees

This form must be completed by deferred pensioners and phased retirees who wish to change their investment portfolios already selected in respect of their existing investments. This document serves as an official investment selection instruction to Alexforbes.

About your employer

Name of fund

UNIVERSITY OF CAPE TOWN RETIREMENT FUND (UCTRF)

Member number

About you (the member)

Please fill in all the information in this section. If there are any changes to your personal particulars, please write to let us know.

Personal and contact details

Surname

First names

Title ☐ Prof ☐ Dr ☐ Mr ☐ Mrs ☐ Ms ☐ Other (specify)

ID or passport number

Country of issue

Date of birth

Contact details

Home number

Work number

Cell number

Email

I agree to the following investment choice and switch terms and conditions:

1. Alexforbes will implement an investment instruction when they have received a completed application in the prescribed format, registered my request to make my own investment choice selections and have confirmed receipt of the investment instruction form to me.
2. I understand that should the form be incomplete or inaccurately completed, the instruction may not be actioned by Alexforbes.
3. An investment instruction will be implemented within 5 working days of confirmation of receipt.
4. If I have not received a confirmation of receipt within 5 working days, I must make enquiries, as my request may not have been received and processed.
5. Queries regarding the progress of an investment selection instruction must be directed to the call centre on **0860 60 61 62**.
6. The fee for investment changes is determined by the UCTRF Board from time to time. For details on the applicable fees, please refer to the UCTRF investment guide, which can be found here: <https://uctrf.co.za/uctrf/member-guides>.
7. Should you wish to receive a switch certificate confirming your switch, please request one by calling the call centre on **0860 60 61 62** or by emailing zzswitches@alexforbes.com.

I hereby make application to make my own investment choice and ask that my **existing investments** (current member share) be invested as follows:

☐ **Option 1: Life Stage Model (100%)**

OR

☐ **Option 2:** Switch the investment portfolios of my current member share to the following portfolios (complete the details below)

Portfolio				%
Balanced Portfolio				%
Capital Preservation Portfolio				%
Shari'ah Compliant Balanced Portfolio				%
Total	1	0	0	%

I hereby declare that:

1. I have taken financial advice or assert that I have a good understanding of investments and do not need the services of a financial adviser.
2. I understand the risks in selecting my own investment portfolios and am satisfied that my selection serves my needs.
3. I take full responsibility for my choices and hereby indemnify and undertake not to hold the UCTRF, the UCTRF Office, the UCTRF Board or Alexforbes and its agents, directors, officers and any entity in the Alexforbes group responsible for any losses or any eventuality that may result from the investment portfolios I select.

Signed at _____ on _____ 20____.

Member's signature

Financial adviser's details

Inititals and surname

[illegible]

FAIS licence number

| | | | |

Office telephone number

[illegible]

Cell number

| | | | | | | | |

Email

Please note: If you have completed this form electronically, kindly print and sign the form before returning it to Alexforbes. Please email the completed form to zzswitches@alexforbes.com