

Member Investment selection form

This form must be completed by members who wish to make application to select their own investment portfolios or who wish to change the portfolios already selected. Members can select the investment portfolios in respect of their existing investments, and/or their future contributions (including transfer values to be received in future). This document serves as an official investment selection instruction to Sanlam Employee Benefits.

Member's personal particulars			
Title and Initials		ID Nr / Passport Nr	
Full names and surname			
Membership Number		Employee Number	
Contact Number(s)	Home		Cell
Email Address <i>(this will be our main means of communicating directly with you)</i>			

I agree to the following investment choice and switch terms and conditions	
1.	Sanlam Employee Benefits will implement an investment instruction when they have received a completed application in the prescribed format, registered the member's request to make his or her own investment choice selections and have confirmed to the member receipt of the investment instruction form
2.	I understand that should the form be incomplete or inaccurately completed, the instruction may not be actioned by Sanlam Employee Benefits.
3.	An investment instruction will be implemented within five working days of confirmation of receipt.
4.	If I have not received a confirmation of receipt within five days, I must make enquiries, as my request may not have been received and processed.
5.	Please e-mail the completed documentation to switch.south@sanlam.co.za or fax to (021) 957 3078. Queries regarding the progress of an investment selection instruction must be directed to the call centre on 086 678 9900.
6.	One Investment change is free of charge per review year, thereafter a switch fee will be charged per switch (excluding VAT). The switch fee may increase annually.

Switching Rules	
1.	You must be 53 years or older as at the option date in order to exercise this switch.
2.	A switch can be exercised once every three months and the three-month period commences on the option date.

Member investment choice		
Investment Portfolios	Existing investments	Future contributions
Growth Portfolio		
Capital Protection Portfolio		
Aggressive Absolute Growth Portfolio		
Conservative Absolute Growth Portfolio		
Satrix Inflation-linked Bond Portfolio		
Old Mutual Albaraka Balanced Fund		
	Total 100%	Total 100%

Please note that by electing your own investment portfolio you will be excluded from the Fund's LifeStage model. Thus, if you do not wish to participate in the LifeStage model and would like your fund credit to remain in the Market Related Portfolio, please indicate as such in the allocations above.

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 Fund, the Board of Trustees or Sanlam Employee Benefits and its agents, directors, officers and any entity in the Sanlam Group of Companies responsible for any losses or any eventuality that may result from the investment portfolios I select.

Signed at _____ on _____ ccyy _____

Member's Signature

Financial adviser particulars	
Initials and surname:	
FAIS license number:	Office number:
E-mail address:	Cell number:

Disclaimer

Personal Information (PI) requested in this form is mandatory for operational and administrative processes, and to comply with regulatory requirements. If the mandatory information is incomplete, your request may not be processed. Sanlam Life Insurance Limited will take reasonable steps to ensure that the PI collected on this form is processed responsibly, kept safe and confidential, and does not unjustifiably infringe your privacy. You can read the Sanlam Privacy Notice on <https://www.sanlam.com/legal/pages/sanlams-privacy-policy.aspx>; it can be sent to you on request. You can update your contact details by registering and logging onto our member portal here: <https://cp.sanlam.co.za> or email: SCClientCare@sanlam.co.za or call: 086 122 3646.