

## In-fund preservation – Change of member details

The purpose of this form is to update your personal and contact information.

### Follow these steps to change your details or beneficiaries

1. You need to fully complete all sections of the form.
2. You must sign the form and date it.
3. Attach the documents requested below to the completed form.
4. Keep the first two pages for reference in case of any queries.
5. Send the form to us or deliver it to the address shown at the top of the form.
6. If you make changes to what you have already filled in, you must sign next to each change.
7. Alexforbes is not responsible for any loss incurred due to incomplete information in this document.

### In this form

The personal information you provide in this form will be processed and used for the purpose of keeping you informed of changes within the fund and legislation which could impact your savings strategy. It will also be used to process your benefit in terms of the fund rules.

### Documents you must attach to this form

You must attach copies of the documents listed below to this form. We'll start to process your change of details request once we have:

- A certified copy of your identity document
- Proof of your change of residential address (only if you have moved)

### Personal information, privacy and security

To find out how we protect your personal information, privacy and security, Please click on the link below:

<https://invest.alexforbes.com/za/en/global/popia-clause>

### Information officer

For compliance and information on the Protection of Personal Information (POPIA, please contact our information officer on the following email address – [AFFundIO@alexforbes.com](mailto:AFFundIO@alexforbes.com).

### How to contact us

For all information about transactions and for general enquiries, you can contact us at the following email addresses:

[paidupmembers@alexforbes.com](mailto:paidupmembers@alexforbes.com) or call us on 0860 100 333

## In-fund preservation – Change of member details

Name of fund

Membership number

### About you (the member)

#### Personal details

Surname

First names

Maiden name

Title  Prof  Dr  Mr  Mrs  Ms  Other (specify)

ID/passport number

Date of birth

Passport expiry date

Country of issue

Country of residence

#### Residential address (this is the address where you live most of the time)

Unit number

Complex

Street number

Street or farm name

Suburb

City or town

Country

Code

#### Postal address

Code

#### Contact details

Cell

Home

Work

Email

How would you like to receive correspondence from us?

By email (if available)

SMS (Please provide your mobile number)

## Tax details

Income tax number

Revenue office

Country of residence for tax purposes

Are you  Single  Married  Divorced  Widowed  Separated  Living with partner

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## Nominating your beneficiaries

It is important to review your nominated beneficiaries from time to time, especially in the event of a marriage, divorce, death or birth. You can view and update your nominated beneficiaries on [AF Connect](#).

## Your declaration

By signing this declaration, you confirm that:

1. All information on this form is correct and complete. You understand that if there is any loss or delay in payment of your benefit, because you have given incorrect or incomplete information in this form, neither Alexforbes nor the fund is responsible for the losses caused as a result.
2. If you do not receive written confirmation from Alexforbes stating that the changes requested in this form have been made, you need to follow up with Alexforbes.
3. I understand that it is my responsibility to keep my personal information up to date at all times.

Your name

Your signature \_\_\_\_\_

Date

## Complaints

- We would like to hear from you if you have a complaint.
- You can make a complaint in person at any of our offices, by email at [contactus@alexforbes.com](mailto:contactus@alexforbes.com), by phone on 0860 000 279 or +27 (0)11 669 7026 if you're outside South Africa, or by following our complaints process on the website at <https://www.alexforbes.com/za/en/contact/Complaints.html>.
- Please contact us if you have any questions or if you need more information.