

## In-fund preservation switch instruction form

The purpose of this form is to give an instruction to transfer the money you have invested in the in-fund preservation fund. This is referred to as an investment switch.

### In this form:

- 'You' refers to the person named on this form as the member.
- 'We' and 'us' refer to the administrator of the fund.
- 'Fund' refers to the fund that you are a member of.

### Key points to understand about this form

Please read this document carefully. Contact us or your financial adviser if you have any questions. You should sign the form only if you agree to all the terms and conditions. The form is part of your contract with us. You must make sure that all the information is correct and that all parts of the form are complete. We have the right to treat the information given in the form as accurate and complete. If you make changes to what you have already filled in, you must sign next to each change.

### Follow these steps

1. You need to fill out the form. You do have the option of filling in this form electronically and printing the electronic version of the form to be signed.
2. You must sign the form and date it.
3. Keep the first two pages to refer to for any questions you have.
4. Send the form to us or deliver it to the address shown at the top of the form.

### Delays in carrying out your instructions

Neither we nor the fund are responsible for any losses that result from any delays you cause by not filling in this form accurately. This includes losses in the value of the investment and losses that occur because you may have to pay more tax than expected.

### Time frames for carrying out your switch instructions

We will carry out your switch instructions within **five (5) business days**.

Switches out of **AF Retirement Navigator** will be **processed once a month only** and on the **same day every month**. All switches received over a calendar month will be **processed on the 12th of the next month (or the next business day of it falls on a weekend or public holiday)**.

### Confirming your switch has been made

Alexforbes will send you confirmation that your switch has been made within ten working days of receiving your switch form.

### If the switch form is not complete

If the switch form is not complete or not filled in properly, Alexforbes may not be able to make the switch.

### Check that the switch has been made properly

You need to advise the Fund contact centre on 0860 100 333 within 30 days if the switch has not been made in the way you instructed and intended.

### If the switch is not made

Alexforbes will take all reasonable commercial steps to make sure that switches take place within five working days. If this does not happen because of an administration error, your money in the fund will be placed in the same position it would have been had the error not been made. This means that the money may be increased or decreased once the error has been corrected.

### View your switch election on AF Connect

Please view the result of the election change on AF Connect, using the following address to connect to the website:

<https://www.alexanderforbesonline.co.za>. Alternatively, if you don't have access, please call the AF Connect help line on 0860 100 333 to help you get registered.

### We are not responsible for any losses you suffer due to:

- errors made by the manager of a financial product
- unauthorised instructions received from those representing you
- failures of networks or electronic or mechanical devices
- our acting on incorrect information where you have failed to notify us of changes to that information
- delayed transactions due to factors beyond our control

## Switch certificate

A switch certificate (confirming your switch instruction) will be sent to you within five business days once the switch has been made

## Personal information, privacy and security

**TO FIND OUT** how we protect your personal information, privacy and security.

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**Alexforbes is not responsible for any loss you or anyone else may suffer if important information is left out of this document.**

### How to contact us

- If you want to ask us if we have your personal information, you can contact us at the telephone number shown at the top of the form.
- If your personal information is incorrect, we will change it if you make us aware of this.
- For all enquiries, you can contact us at the following email address [paidupmembers@alexforbes.com](mailto:paidupmembers@alexforbes.com).

### 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 <http://www.alexforbes.com/za/en/ContactUs/Complaints.aspx>.
  - Please contact us if you have any questions or if you need more information.
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