Sanlam Plus Preservation Fund
Member Investment Selection

Important Information
• This document serves as an official investment selection instruction to Sanlam Corporate. • This form must be completed by members who wish to make an application to select their own investment portfolios or who want to change the portfolios which they have already selected. • **Please e-mail the completed documentation to: SEBMemberSwitches@sanlam.co.za**

SECTION A: Member's personal details				
Title				
First name(s)				
Surname				
RSA Identity number*			**Compulsory*	
If not RSA, passport number*			**Compulsory* (if the RSA ID not used)	
Date of birth*			(dd/mm/yyyy) **Compulsory if Passport used*	
Contact number(s)	Cell phone		Alternative	
Email				

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

1. Sanlam Corporate 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 Corporate.
3. An investment instruction will be implemented within 5 working days of confirmation of receipt.
4. Queries regarding the progress of an investment selection instruction must be directed to the call centre on 086 122 3646
5. Information relating to the portfolios on the investment choice menu, their performance and any amendments thereto will be maintained on Sanlam Corporate's Member Portal (https://www.sanlamonline.co.za/login/) and will constitute the method of communication of investment related information with members in addition to the annual benefit statement.
6. If I switch from any smoothed bonus portfolio, the rules of the specific product will apply. In certain instances, the disinvestment(s) may be done at the lower of market- and book value.

Member declaration of investment choice

I hereby make application to make my own investment choice and ask that my investments be invested as follows:

Choose a maximum of 4 portfolios from the following selection

Portfolios		Existing investments
Single manager range	Sanlam Enhanced Cash Fund	**%**
Multi-manager range	SMM 70 Portfolio	**%**
	SMM 50 Portfolio	**%**
	SMM 30 Portfolio	**%**
	SMM Moderate Absolute Fund	**%**
	SMM NUR Balanced Fund	**%**
	Sanlam Accumulation Portfolio	**%**
	Sanlam Wealth Creation Portfolio	**%**
Smoothed Bonus range	Sanlam Monthly Bonus Fund	**%**
	Sanlam Stable Bonus Portfolio	**%**
Index-tracking range	Satrix Enhanced Balanced Tracker Fund	**%**
External Single-manager range	Allan Gray Global Balanced Portfolio	**%**
	Camissa Balanced Fund	**%**
	Coronation Houseview Portfolio	**%**
	Ninety-One Balanced Fund	**%**
Graviton	Graviton SCI Balanced	**%**
	Graviton SCI Low Equity	**%**
	Total	**100%**

SECTION D: Declaration - I hereby declare that:			
1. I have taken financial advice. (Complete Financial Advisor details below)			☐
OR			
2. I have a good understanding of investments and do not need the services of a financial adviser			☐
I take full responsibility for my choices and hereby indemnify and undertake not to hold the Sanlam Plus Preservation Fund, the Board of Trustees, my employer, Sanlam Life Insurance Limited (acting herein through its Sanlam Corporate division), its agents, directors, officers and any entity in the Sanlam Group of Companies responsible for any losses or damages that may result from the investment portfolios I select.			
Signed at		Identity number	
Member's signature		Date *(dd/mm/yyyy)*	

SECTION E: Financial adviser details			
Name and surname			
FSP license number		Office contact number	
E-mail address:		Cell phone number	
Financial adviser's signature		Date (*dd/mm/yyyy)*	

Protection of Personal Information Disclosure

Why Personal Information is required: Sanlam Life Insurance Limited ("Sanlam Life"), a subsidiary of Sanlam Limited, will process and protect your personal information as required by relevant laws and the Constitution of the Republic of South Africa ("RSA"). The personal information requested in this form, which may include special personal information is being collected and will be processed for the following purposes:

- underwriting and providing accurate and effective insurance cover and related value-added services;
- member communication;
- market research and statistical analysis;
- verification of the personal information provided;
- to comply with all legal and regulatory requirements, including applicable codes of conduct;
- for operational and administrative processes to protect Sanlam Life's interests

Failure to provide the mandatory information will prejudice your insurance cover.

Changing and correcting Personal Information: You have the right to:

- Request a copy of your personal information as processed by Sanlam Life;
- Ask for an update and/or correction of your personal information;
- Lodge a complaint with the Information Regulator.

Sanlam Life may charge an administrative fee subject to prior notice of any such cost before executing the request for a copy of your personal information.

Other parties that may receive the Personal Information:

- We may share your personal information within Sanlam Limited and/or with other service providers where required for any of the purposes listed above, or with third parties where Sanlam Life is lawfully required to do so.
- We may send your personal information to service providers outside the RSA for storage or further processing on Sanlam Life's behalf. We will not send your information to a country that does not have information protection legislation similar to that of the RSA, unless we have a binding agreement with the service provider which ensures that it effectively adheres to the principles for processing of personal information in accordance with the Protection of Personal Information Act, 2013.

For more information, please refer to the Sanlam Group Privacy Notice.

Member
Quick Access
Self Service

Get in touch with your retirement information

Member Support:
You can update your contact details by registering and logging into our member portal here:
Web: https://www.sanlamonline.co.za/login/ **or Email:** SCClientCare@sanlam.co.za or **Tel:** 086 122 3646