

# Sanlam Plus Preservation Fund

## Member investment selection form

|                                       |  |                                         |  |
|---------------------------------------|--|-----------------------------------------|--|
| Sanlam Plus Pension Preservation Fund |  | Sanlam Plus Provident Preservation Fund |  |
|---------------------------------------|--|-----------------------------------------|--|

### General information

1. Completed documentation should be returned to Sanlam Umbrella Fund Administration via email to: [sebmemberswitches@sanlam.co.za](mailto:sebmemberswitches@sanlam.co.za). Your member number should be indicated in the subject line.
2. Please complete all the relevant sections of this application.
3. Sanlam Corporate will only process this investment switch once all required documents and information has been received.

### Member's personal particulars

|                         |       |                |       |
|-------------------------|-------|----------------|-------|
| Title and Initials:     |       | Date of birth: |       |
| Full Names and Surname: |       |                |       |
| Member Number:          |       | ID Number:     |       |
| Contact Number(s):      | Home: |                | Cell: |
| E-mail address:         |       |                |       |

### 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. If I have not received a confirmation of receipt within 5 days I must make enquiries as my request may not have been received and processed.
4. An investment instruction will be implemented within 5 working days of confirmation of receipt.
5. Queries regarding the progress of an investment selection instruction must be directed to [sebmemberswitches@sanlam.co.za](mailto:sebmemberswitches@sanlam.co.za).
6. Information relating to the portfolios on the investment choice menu, their performance and any amendments thereto will be maintained on the SC Portal (<https://cp.sanlam.co.za>) and will constitute the method of communication of investment related information with members in addition to the annual benefit statement.

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

**Choose portfolios from the following selection**

|                                      | <b>Portfolios</b>                           | <b>Existing investments</b> | <b>Future investments</b> |
|--------------------------------------|---------------------------------------------|-----------------------------|---------------------------|
| <b>Single Manager Range</b>          | SIM Enhanced Cash                           | %                           | %                         |
| <b>Multi-manager Range</b>           | SMM 70 Portfolio                            | %                           | %                         |
|                                      | SMM 50 Portfolio                            | %                           | %                         |
|                                      | SMM 30 Portfolio                            | %                           | %                         |
|                                      | SMM NUR Balanced Fund                       | %                           | %                         |
|                                      | SMM Moderate Absolute Fund                  | %                           | %                         |
|                                      | Sanlam Accumulation Portfolio               | %                           | %                         |
|                                      | Sanlam Wealth Creation Portfolio            | %                           | %                         |
| <b>External Single Manager Range</b> | Sanlam Allan Gray Global Balanced Portfolio | %                           | %                         |
|                                      | Sanlam Coronation Houseview Portfolio       | %                           | %                         |
|                                      | Kagiso Balanced Portfolio                   | %                           | %                         |
|                                      | Ninety One Balanced Fund                    | %                           | %                         |
| <b>Smoothed Bonus Range</b>          | Sanlam Monthly Bonus Fund                   | %                           | %                         |
|                                      | Sanlam Stable Bonus Portfolio               | %                           | %                         |
| <b>Index-tracking Range</b>          | Satrix Enhanced Balanced Tracker Fund       | %                           | %                         |
| <b>Graviton Client Only</b>          | Graviton Balanced                           | %                           | %                         |
|                                      | Graviton Low Equity Fund                    | %                           | %                         |
|                                      |                                             |                             | <b>Total 100%</b>         |

## 1. Declaration by member

Choose option A or B:

### Option A: I have taken financial advice and declare the following:

- The information given herein is true and correct,
- I take full responsibility for my choices and those recommended by my financial adviser and hereby indemnify and undertake not to hold the Sanlam Plus Preservation Fund, the Board of Trustees or Sanlam Corporate 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.
- I understand that the onus is on me to inform the Administrator of any change in my contact details and that any reasonable costs incurred to trace me in future will be deducted from my benefits.

Signature of member: \_\_\_\_\_ Date: \_\_\_\_\_

### Option B: I have not taken financial advice and declare the following:

- The information given herein is true and correct,
- I have a good understanding of investments and do not need the services of a financial adviser,
- I understand the risks in selecting my own investment portfolios and am satisfied that my selection serves my needs, and
- I take full responsibility for my choices and hereby indemnify and undertake not to hold the Sanlam Plus Preservation Fund, the Board of Trustees or Sanlam Corporate 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.
- I understand that the onus is on me to inform the Administrator of any change in my contact details and that any reasonable costs incurred to trace me in future will be deducted from my benefits.

Signature of member: \_\_\_\_\_ Date: \_\_\_\_\_

### 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](mailto:SCClientCare@sanlam.co.za) or call: 086 122 3646.