

FundsAtWork Umbrella Funds two-pot form

Allocate money to your retirement component

Member number

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- You must complete this form if you want to allocate money in your savings and/or vested components into your retirement component.
- If you belong to both the FundsAtWork Umbrella Pension Fund and the FundsAtWork Umbrella Provident Fund, you must complete two separate forms.

Section 1: Employer and Fund detail

Name of Fund	<input type="text" value="FundsAtWork Umbrella Pension Fund"/>	<input type="text" value="FundsAtWork Umbrella Provident Fund"/>
Name of employer	<input type="text"/>	

Section 2: Member personal details

Employee number	<input type="text"/>		
Title	<input type="text"/>	Initial(s)	<input type="text"/>
First name(s)	<input type="text"/>		
Surname	<input type="text"/>		
Date of birth	<input type="text" value="D D"/> - <input type="text" value="M M"/> - <input type="text" value="Y Y Y Y"/>		
ID/passport number	<input type="text"/>		
Passport country of origin	<input type="text"/>		
Email address	<input type="text"/>		
Cellphone number	<input type="text"/>	Alternative number	<input type="text"/>

Section 3: Allocation instruction

Please transfer the money in my savings and/or vested components into my retirement component as follows:
Tick the appropriate box(es)

Savings component	<input type="checkbox"/>	R	<input type="text"/>	or	<input type="text"/>	%
Vested component	<input type="checkbox"/>	R	<input type="text"/>	or	<input type="text"/>	%

Before you choose to allocate money into your retirement component, please read the notes in section 4 of this form.

Section 4: Notes

- You will only be allowed to allocate money in your savings and/or vested components into your retirement component, meaning no other component allocation is allowed.
- You can allocate the whole, or only a portion of your vested and/or savings components into your retirement component.
- It will be an irreversible allocation of the money from your savings and/or vested components into your retirement component, meaning you cannot reverse the allocation at a later stage.
- If you choose to allocate the money in your savings component and/or your vested components to your retirement component in the Fund, you will no longer be able to take:
 - the money allocated from your savings component as an annual savings component cash withdrawal.
 - this allocated money in cash when you withdraw from the Fund, meaning the cash portion of your retirement savings that you can take when you withdraw from the Fund will be reduced by the amount that you allocated to your retirement component.
 - this allocated money in cash when you retire from the Fund, meaning the cash portion of your retirement savings that you can take when you retire from the Fund will be reduced by the amount that you allocated to your retirement component and you will have to buy a pension with it.
- If you choose to allocate money in your vested component to your retirement component in the Fund and your vested component has a T-day vested and non-vested benefit, we will first allocate as much of your non-vested benefit as possible before allocating any money from your vested benefit. If you belonged to a provident fund on 1 March 2021 and you were:
 - younger than 55 years, your T-day vested benefit is your retirement savings in that provident fund on 1 March 2021 plus the growth thereon until your retirement. Your T-day non-vested benefit is all the contributions that you make to the provident fund or any other fund after 1 March 2021.
 - 55 years or older, your T-day vested benefit is your retirement savings in that provident fund on 1 March 2021 plus all the contributions you make to that provident fund after 1 March 2021. If you decide to transfer to any other fund after 1 March 2021, the contributions you make in the new fund will be your T-day non-vested benefit.

Section 5: Declaration by member

I, (full names)

declare that:

- all information provided in this form is true and correct.
- I authorise the Fund to allocate my savings and/or vested component to my retirement component in the Fund as shown in this form.
- the tax implications of allocating my savings and/or vested component to my retirement component have been explained to me in full.
- the allocation instruction in this form is my final instruction, and I understand that it is an irreversible allocation instruction, which means I cannot change it at a later stage.
- I have read the notes in section 4 of this form.

I indemnify the Fund and their administrator, Momentum Corporate, against any claim, loss, and/or damage that may arise due to this allocation choice I made.

I agree that the Fund and their administrator, Momentum Corporate, may process all information that I provide on this form. I understand that the information will be processed in line with the Protection of Personal Information Act, 2013, and the Fund and Momentum Corporate's strict policies on protecting the confidentiality of my personal information.

[Click here](#) to read the full privacy notice of the Fund.

Signature	<input type="text"/>	Place	<input type="text"/>								
		Date	<table border="1"><tr><td>D</td><td>D</td><td>-</td><td>M</td><td>M</td><td>-</td><td>2</td><td>0</td><td>Y</td><td>Y</td></tr></table>	D	D	-	M	M	-	2	0
D	D	-	M	M	-	2	0	Y	Y		

Options to sign the form:

1. Print the form, then sign and scan it and send it back via email to momentumcorporateclient@momentum.co.za.
2. Place your scanned signature in the signature block.

How to use a scanned signature:

- Select the 'comments' tab from your menu in Adobe.
- Select the 'add stamp' icon.
- Select custom stamps.
- Create custom stamps.
- You can now browse and upload your signature to save it as a custom stamp under 'sign here' in Adobe.
- You can now go back to your 'stamps' icon and select 'sign here' and select your saved signature.
- Place it in the document and save the document.
- Store your scanned signature in a safe place on your computer.

When you want to print the form to complete by hand you can turn off the field highlights by selecting the "highlight existing fields" on the top right hand corner of your screen.