momentum
corporate

FundsAtWork Preservation Funds
Changes to product option and investment portfolio

Note: We recommend that you contact your financial adviser before you make any changes to your product option and investment portfolio.

Member number

Section 1: Fund details

Fund name

Type of fund: Pension fund / Provident fund

Section 2: Member details

Title | Initial/s | First name

Surname

Date of birth: D D - M M - Y Y Y Y

RSA ID: Yes / No | Identity / Passport number

Passport country of origin

Telephone - work | Fax

Telephone - home | Cellphone number

Email address

Section 3: Product option choice

To be completed by a member to change the product option on the Fund. Please indicate which product option you are currently in and to which product option you wish to move to.

From: Founder / Provider / Entrepreneur

To: Founder / Provider / Entrepreneur

If Founder was chosen as a new option, then the Trustee Choice Portfolio will apply.
If Provider or Entrepreneur was chosen as a new option, please complete the applicable part of section 4.

Section 4: Investment portfolio choice (to be completed if Provider or Entrepreneur applies)

Section 4a: Investment choice: Momentum Lifestages Portfolio

To be completed by a member belonging to the Provider or Entrepreneur options, who wish to move to a Momentum Lifestages portfolio.

Provider	**Entrepreneur**	
Momentum Enhanced Lifestage	Momentum Enhanced Lifestage	Momentum Passive Lifestages portfolio 100%
Momentum Target Lifestage	Momentum Target Lifestage	
Momentum Classic Lifestage	Momentum Classic Lifestage	

Section 4b: Investment choice: Any other portfolio selected excluding Momentum Lifestage portfolios

To be completed by a member if the portfolio selected is not one of the Momentum Lifestages portfolios.

(i) Retirement savings account

Please switch the amount in my **retirement savings account** as follows:

From: Name of investment portfolio/s	Percentage allocation

To: Name of investment portfolio/s	Percentage allocation

Member number

Section 4: Investment portfolio choice (continued)

(ii) Transfer account

Please invest the **money transferred to FundsAtWork from another pension or provident fund** as follows:

From: Name of investment portfolio/s	Percentage allocation (must add up to 100%)

Section 5: Declaration by member

I ______________________________ (full names)

hereby declare that:

- all particulars furnished in this form are true and correct;
- I have "opted out" of the Trustee Choice Portfolio (refer to note 7); and
- I will not hold the trustees of the Fund responsible for the performance of the portfolio/s in which I have selected to invest.
- I agree that Momentum Corporate may process all information that I provide on this form. I understand that the information will be processed in accordance with the Protection of Personal Information Act, 2013 and Momentum Corporate's strict policies on protecting the confidentiality of my personal information.

  I agree that Momentum Corporate may use my personal information to provide and administer retirement fund investment and insurance products and share my personal information with Momentum Corporate's partners and contracted service providers, who are legally bound to protect the information.

  Click here to read the full consent document.

Signed at ______________________________

Member's signature ______________________________ **Date** D D - M M - 2 0 Y Y

Completed form to be faxed to 012 675 3970 or emailed to fawpreservationfund@momentum.co.za.
You may also log onto our website at www.momentum.co.za/fundsatwork and make changes to your investments electronically.

Section 6: Terms and conditions

1. Momentum FundsAtWork will process a valid instruction to switch a member's product option or investment portfolio within 7 working days after it has received the correct and valid instruction. Momentum FundsAtWork will process a valid instruction to change both the product option and investment portfolio within 14 working days after it has received the correct and valid instruction. In the event of bulk transaction instructions, Momentum FundsAtWork may need to structure it over a longer period as agreed by the investment manager. A bulk transaction is where the total investments involved equals or exceeds the percentage of the portfolio's total assets specified by the specific portfolio manager.
2. Please ensure that you track this instruction via the website, www.momentum.co.za/FundsAtWork. Please inform our client contact centre on 0860 65 75 85 within 20 working days of submitting this form if the instruction was not executed or executed incorrectly by Momentum FundsAtWork. Please note that after the expiry of 20 working days, Momentum FundsAtWork will not accept any liability or responsibility whatsoever for any losses incurred resulting from the incorrect execution of your instruction.
3. Please note that if a selected portfolio is capped, the switch instruction in this form will not be executed in its entirety.
4. Momentum FundsAtWork will not be liable for any losses the member incurs if the information supplied is unclear, illegible or incorrect in any way.
5. An instruction will only be considered to be correct and valid if all of the following and such other requirements as Momentum FundsAtWork may determine from time to time are met:
   - The instruction must be in writing;
   - The instruction must be readable;
   - The instruction must be on the form and in the format decided on by the trustees of the Fund;
   - The form must be signed;
   - The portfolio that is chosen must be clear;
   - The portfolio that is chosen must be available;
   - The allocation between different portfolios must add up to 100% (where applicable);
   - The investment allocation following execution of the investment instruction must comply with Regulation 28 of the Pension Funds Act;
   - The instruction must be addressed to the person as specified by Momentum FundsAtWork, and
   - The instruction must be sent to the facsimile number or e-mail address as specified by Momentum FundsAtWork.

6. The investment instruction can be submitted to Momentum FundsAtWork one of the following ways:
   - by fax;
   - via the on-line internet portal using the relevant user identification and security code;
   - by e-mail from the member;
   - by fax signed by a person legally appointed to act on the member's behalf if the member is incapable of signing an instruction because of injury, illness or mental incapacity;
   - by fax signed by the member's financial adviser, or via the internet by the member's financial adviser, using the relevant user identification and security code, as long as Momentum FundsAtWork has been provided with a mandate from the member authorising the financial adviser to act on his behalf and Momentum FundsAtWork has approved such financial adviser, or
   - where the administration system of the administrator allows for it, via voice-recorded transaction, subject to the terms and conditions determined by Momentum FundsAtWork.
7. If for whatever reason Momentum FundsAtWork does not receive correct and valid instructions, the instructions will not be executed and the retirement savings account balances and transfer amount, if applicable, of the member will be kept in the current investment portfolio, or, if no investment portfolio was previously chosen, it will be placed into the Trustee Choice Portfolio under the Provider Option.

When you sign this form by inserting a digital signature it confirms that the information provided is true and correct.

Options to sign the form:

1. Print out the form, sign and scan it and send it back via email to fawpreservationfund@momentum.co.za, call 086 055 5572 or fax it to Fax +27 (0)12 675 3970.
2. Place your scanned signature in the signature block.
   - Store your scanned signature in a safe place on your computer.
   - 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.

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.

submit form save form print

Momentum Metropolitan Life Limited 268 West Avenue Centurion 0157 PO Box 7400 Centurion 0046 South Africa
Tel +0860 65 75 85 Fax +27 (0)12 675 3970
multiplyforcorporates@momentum.co.za www.momentum.co.za/fundsatwork