



National Fund for Municipal Workers Investment Portfolio Switch Instruction (Living Annuities)

Investment return on an individual's retirement savings is probably the most significant factor in determining the level of financial independence that you will enjoy after retirement. This document facilitates a member's intervention in that regard. The Board of Trustees of the NFMW cautions annuitants to act sensibly in altering their investment strategy and portfolio compilation and they are therefore urged to consult with a qualified financial advisor before effecting this instruction.

SEND COMPLETED FORM TO E-MAIL: A002@nationalfund.co.za
The fund will not accept any Investment Portfolio Switch Instruction form, sent to an email address other than the above.

SECTION A – PERSONAL and MEMBERSHIP INFORMATION

| | |
|---|---|
| Membership Number | <input style="width: 100%;" type="text"/> |
| Surname | <input style="width: 100%;" type="text"/> |
| Full names | <input style="width: 100%;" type="text"/> |
| E-mail address | <input style="width: 100%;" type="text"/> |
| ID number <small>ATTACH COPY OF ID DOCUMENT</small> | <input style="width: 100%; text-align: center;" type="text"/> |
| Telephone number – Mobile | <input style="width: 100%; text-align: center;" type="text"/> |
| Telephone number – Home | <input style="width: 100%; text-align: center;" type="text"/> |
| Home postal address | <input style="width: 100%;" type="text"/> |
| Postal code | <input style="width: 100%; text-align: center;" type="text"/> |
| Home physical address | <input style="width: 100%;" type="text"/> |
| Postal code | <input style="width: 100%; text-align: center;" type="text"/> |

INVESTMENT ALLOCATION

| Portfolio | % Split |
|---------------------------------------|---|
| NFMW Living Annuity Capital Protector | <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> % |
| NFMW Living Annuity Stable Growth | <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> % |
| NFMW Living Annuity Capital Growth | <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> % |
| NFMW Living Annuity Aggressive Growth | <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> % |
| TOTAL | 1 0 0 % |

DECLARATION BY ANNUITANT

I

hereby confirm that I elect to transfer my investment to the investment portfolios as indicated above.

I further agree/declare that:

1. I bear the full investment risk of the financial markets and am satisfied that my selection above supports my needs.
2. Bonuses will vest in the newly selected portfolio/s within 5 – 7 working days following the date of receipt of the duly completed switch instruction by the Administrator, regardless of the signature date below.
3. The onus is on me to ensure that I have received a Switch Instruction Certificate from the Fund within 60 days from sending this instruction and to verify that the instruction has indeed been correctly processed on my fund record; failing which I indemnify the Fund from any claims in respect of investments in any of the options against my intention.
4. I have consulted with a qualified financial advisor in order to obtain professional advice insofar the above requested amendments to my investment portfolio are concerned. Alternatively, I declare that I have the necessary knowledge of investments and therefore do not need the advice of a qualified financial advisor.
5. I accept sole responsibility for the choices selected above and irrevocably indemnifies the National Fund for Municipal Workers, its Board of Trustees or any representative of the aforementioned entities for any losses or damages that I may incur as a result of the investment portfolios selected and hereby relinquish all rights to any potential claim that I might have against the mentioned entities.

Signature: Annuitant

Date

National Fund for Municipal Workers CONTACT DETAILS

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