

## Member Investment selection form

This form must be completed by members who wish to make application to select their own investment portfolios or who wish to change the portfolio already selected. Members can select the investment portfolio in respect of their existing investments, and/or their future contributions (including transfer values to be received in future). This document serves as an official investment selection instruction to Alexander Forbes Financial Services (Pty) Ltd.

Member's personal particulars			
Title and Initials			ID Nr / Passport Nr
Full names and surname			
Membership Number			Employee Number
Contact Number(s)	Home		Cell
Email Address <i>(this will be our main means of communicating directly with you)</i>			

I agree to the following investment choice and switch terms and conditions	
1.	Alexforbes 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 Alexforbes.
3.	An investment instruction will be implemented within five working days of confirmation of receipt.
4.	If I have not received a confirmation of receipt within five days, I must make enquiries, as my request may not have been received and processed.
5.	Please e-mail the completed documentation to <a href="mailto:zzswitches@alexforbes.com">zzswitches@alexforbes.com</a> or fax to +27 (0) 11 263 2948. Queries regarding the progress of an investment selection instruction must be directed to the call centre on 0860 100 333.
6.	One Investment change is free of charge per review year, thereafter a fee of R683 (including VAT) per switch is payable. The switch fee may increase annually.

Switching Rules	
1.	You must be 53 year or older as at option date in order to exercise this switch.
2.	A switch can be exercised once every three months and the three-month period commences on the option dat.

Member investment choice		
Investment Portfolios	Existing investments	Future contributions
Growth Portfolio	%	%
Capital Protection Portfolio	%	%
Aggressive Absolute Return Portfolio	%	%
Conservative Absolute Return Portfolio	%	%
Old Mutual Albaraka Balanced Fund	%	%
	<b>Total 100%</b>	<b>Total 100%</b>

Please note that by electing your own investment portfolio you will be excluded from the Fund's LifeStage model. Thus, if you do not wish to participate in the LifeStage model and would like your fund credit to remain in the Market Related Portfolio, please indicate as such in the allocations above.

I hereby declare that:	
1.	I have taken financial advice or assert that I have a good understanding of investments and do not need the services of a financial adviser.
2.	I understand the risks in selecting my own investment portfolios and am satisfied that my selection serves my needs.
3.	I take full responsibility for my choices and hereby indemnify and undertake not to hold the Stellenbosch University Retirement Fund, the Board of Trustees of the Stellenbosch University Retirement Fund, Alexander Forbes Financial Services (Pty) Ltd, its agents, directors, officers and any entity in the Alexander Forbes Financial Services (Pty) Ltd Group of Companies responsible for any losses or damages that may result from the investment portfolios I select.
<b>Signature of member:</b> _____ <b>Date:</b> _____	

Financial Advisor particulars	
Initials and surname:	
FAIS license number:	Office number:
E-mail address:	Cell number: