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ITRANSACT RETIREMENT PLANS - SWITCH FORM

Select the applicable product:

Itransact Retirement Plan ☐ Itransact Preservation Plan ☐

SECTION 1: Investor Details

Investor Name	
Account No.	

SECTION 2: Switch Details

- Percentage Switch: The percentage “Switch To” must add up to 100%.
- Rand Switch: The Rand “Switch To” must add up to the total value of the “Switch From” Investment Portfolio.
- Please note: Should you request to switch an amount in excess of 90% of the Rand value of your Investment Portfolio, a percentage of units switch will be processed equivalent to the Rand amount requested. For example, if the switch Rand amount equates to 92% of your Investment Portfolio, 92% of the unit balance will be switched. In these instances, depending on the confirmed Unit Price for the Investment Portfolio/s the switch amount may be greater or smaller than was originally requested.

☐ **Vested component**

Switch from details:

Portfolio Name	Class	Rands	Units	Percentage

Switch to details:

Portfolio Name	Class	Percentage

☐ **Savings component**

Switch from details:

Portfolio Name	Class	Rands	Units	Percentage

Switch to details:

Portfolio Name	Class	Percentage

☐ **Retirement component**

Switch from details:

Portfolio Name	Class	Rands	Units	Percentage

Switch to details:

Portfolio Name	Class	Percentage

SECTION 3: Debit Order Instruction (retirement plan only)

- Please indicate how you would like your debit order to be treated after the switch (If no election is made the debit order will continue for the current portfolio selection):

  ☐ Debit order instruction to remain unchanged.

  ☐ Debit order to continue for the Investment Portfolio/s you have chosen to switch into.

- Should you wish to cancel or change your existing debit order, please complete the Change of Details Instruction Form.

SECTION 4: Investor Declaration and Signature

- I/We confirm that all the information provided on this form is correct.
- I/We confirm that I/we have read and understood all relevant documentation, such as but not limited to the product information guide, portfolio supplement and minimum disclosure document, associated with this investment.
- I/We acknowledge that I / we are still bound by the terms, conditions and declarations agreed and signed to in the original application documentation.

Signed at (Place) ________________ D D M M Y Y Y Y

Investor's or Authorised Representative's Signature
(If an Authorised Representative please provide proof thereof) ________________

SECTION 5: Financial Services Provider Declaration and Signature

I/We understand/warrant/confirm that:

1. The latest terms and conditions associated with this product are applicable. The Financial Service Provider is responsible for ensuring that he/she/it has read and understood them and explained them to the Member in full. A copy of these terms and conditions may be requested from the Administrator.
2. The Financial Service Provider confirms that all statements made and information provided on this form are correct.

Signed at (Place) ________________ D D M M Y Y Y Y

Advisor's Signature ________________