



# MULTI-FUND SWITCH FORM

I ..... holder of  
(Surname First name Other Names)

Retirement Savings Account (RSA) 

P	E	N																	
---	---	---	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Email Address ..... Mobile Number .....

would like to switch from:

Fund I → Fund II  Fund II → Fund I   
\*Fund II → Fund III  Fund III → Fund II

\*Contributor must be 50years & above

Kindly tick the box as appropriate for the fund you would like to switch to.

### CERTIFICATION:

I am fully aware and understand the features of the new fund type I am choosing, and that:

- RSA holders can switch between fund types maximum of twice in a calendar year
- The first switch is free but the second switch within the calendar year would attract a fee.
- Contributors would be able to switch back to the default fund type as long as age limits are not breached.
- The fee for moving between funds (where it applies) would be deducted from the contributor's RSA.

**DISCLAIMER:** By this application, made with full knowledge of the multi fund guideline, I accept the consequences of my change instruction; subject to PenCom's investment guideline on multi fund which came into force on the 2nd July 2018. I have read and agreed with this disclaimer.

**SIGNATURE:** ..... **DATE:** .....

### FOR OFFICIAL USE ONLY

Received by: ..... Signature: ..... Date: .... / .... / 20.....  
(STAFF NAME)