



MULTI-FUND SWITCH FORM

I holder of
(Surname First name Other Names)

Retirement Savings Account (RSA)

P	E	N												
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Email Address Mobile Number

would like to switch from:

Fund I	→	Fund II	<input type="checkbox"/>	Fund II	→	Fund I	<input type="checkbox"/>
*Fund II	→	Fund III	<input type="checkbox"/>	Fund III	→	Fund II	<input type="checkbox"/>

**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)