



## Retirement Fund Switch Form

PLEASE READ THE IMPORTANT INFORMATION BELOW BEFORE YOU SWITCH

### Important information:

- This form allows you to switch the underlying portfolio that you are currently invested in.
  - Prescient Fund Administration will act upon instruction on this form based on the units, percentage or amount indicated on the switch instruction below.
  - If you are unsure about the available underlying investment options for the retirement fund, please request a list of our approved Regulation 28 compliant funds.
  - All components of your retirement benefit, will be switched according to your selection ie. if you would like to switch 50% from one fund to another, the same switch will be processed on each component of your investment account (your vested, savings and retirement components)
- **For switches within your Prescient Retirement Annuity, Prescient Preservation Provident or Prescient Preservation Pension Fund please complete all relevant sections on this form, and send it to Prescient Fund Administration (Retirement and Life Department) via e-mail [retirement@prescient.co.za](mailto:retirement@prescient.co.za)**
  - **For switches within your Prescient Umbrella Provident Fund, please complete all relevant sections on this form, and send it to Prescient Fund Administration (Employee Benefits Department) via e-mail [ebadmin@prescient.co.za](mailto:ebadmin@prescient.co.za)**
- Cut-off times for receiving instructions are 13:00, except for the Prescient Money Market Fund where the cut off time is 11:00.



1. PERSONAL DETAILS

Investor Number \_\_\_\_\_

Full Name(s) \_\_\_\_\_

ID or Passport Number (if Foreign National) \_\_\_\_\_

2. SWITCH OPTIONS

From Investment Option	Amount/ Percentage	To Investment Option	Amount/ Percentage
Total		Total	

Your existing debit order may be affected by your switch instruction. Please select one of the options below:

☐ Existing debit order to remain the same      ☐ Change debit order (complete the section below)      ☐ Cancel existing debit order

Investment Option	Amount/Percentage	Percentage
Total		

3. AUTHORISATION AND DECLARATION

1. I confirm that all information provided on this form is correct.
2. I have not received advice from the Administrator regarding this instruction.
3. I have read, understood and agree to the latest Terms and Conditions which I understand may have changed since my original investment.
4. Any personal information may be used by the Fund and Prescient in the normal course of business to provide the products and services and the Administrator may retain and share any information for purposes of investment transactions, processing and administration and to communicate directly with me. Personal information may be shared with companies within the Prescient Group for purposes of further onboarding or further processing of any of my current or future investments within the Prescient Group. Prescient Group collectively refers to Prescient Holdings (Pty) Ltd and its subsidiaries and affiliates. Prescient Fund Administration will not sell any personal information to any third parties. Prescient Fund Administration will disclose or report personal information if and when required to do so by law or any regulatory authority, and to our employees, or agents who require such information to carry out their duties

Signature of Investor	
Full Name	
Signed at	
Date	