

INVESTMENT SWITCH

Please complete and email your instruction form to SURFAdmin@srf.sygnia.co.za. Should you have any queries regarding your investment switch, portfolio fact sheet(s) and/or portfolio fee structures, please contact your employer, your financial advisor or refer to the SURF Investment Portfolios document.

FUND DETAILS

Participating employer: _____

Branch/Paypoint: _____

Section: ☐ Pension ☐ Provident ☐ Managed Pension ☐ Managed Provident

MEMBER DETAILS

Title: _____ First name(s): _____ Surname: _____

ID or Passport number (if foreign national): _____ Date of birth: _____

Employee number: _____ Member number: _____

Home telephone number: (____) _____ Work telephone number: (____) _____

Email address: _____ Cellphone number: _____

RETIREMENT BENEFITS COUNSELLING AND FINANCIAL ADVICE

- The board of trustees recommends that you obtain benefit counselling and/or financial advice before completing and submitting this investment selection instruction.
- According to the law “counselling” means “the disclosure and explanation, in clear and understandable language, including risks, costs and charges” of all options available to members.
- Retirement benefits counselling is not financial advice but instead a channel of communication through which to educate, empower and enable you to make informed financial decisions. Financial advice cannot be replaced by retirement benefits counselling.
- SURF’s retirement benefits counsellor can be contacted on 010 595 0574 or surf@srf.sygnia.co.za.

INVESTMENT SWITCH INSTRUCTION

Switches are actioned within ten working days of SURF receiving your investment switch instruction.

INVESTMENT DETAILS

Please select your investment details by ticking one of the boxes below and complete the relevant section.

☐ Default life-stage model ☐ OR ☐ Member investment selection

By switching to the default life-stage model your retirement savings and future contributions will be invested in terms of the life-stage model selected by your employer (this life-stage model could be either the Sygnia Signature, Sygnia Skeleton or Sygnia Synergy range of portfolios.)

SYGNIA UMBRELLA RETIREMENT FUND (PENSION SECTION) FSCA REGISTRATION NO. 12/8/35776
SYGNIA UMBRELLA RETIREMENT FUND (PROVIDENT SECTION) FSCA REGISTRATION NO. 12/8/35801
SYGNIA UMBRELLA RETIREMENT FUND (MANAGED PENSION SECTION) FSCA REGISTRATION NO. 12/8/37769
SYGNIA UMBRELLA RETIREMENT FUND (MANAGED PROVIDENT SECTION) FSCA REGISTRATION NO. 12/8/37771

CENTRAL QUERY LINE: T +27 21 446 2440 | E SURFAdmin@srf.sygnia.co.za

CAPE TOWN: 7th Floor | The Foundry | Cardiff Street | Green Point | 8001 | T +27 446 4940

JOHANNESBURG: Unit 40 | 6th Floor | Katherine & West Building | West Street | Sandton | 2196 | T +27 10 595 0550

DURBAN: Office 2 | 2nd Floor | Ridgeview | 1 Nokwe Avenue | Ridgeside | Umhlanga Ridge | 4319 | T +27 31 001 0650

surfquery@srf.sygnia.co.za | www.sygnia.co.za

Sygnia 

MEMBER INVESTMENT SELECTION

If you ticked member investment selection above, you confirm and accept the following:

- You acknowledge and agree that you understand the risks associated with selecting your own investment strategy and that there are significant market risks associated with the instruments underlying the investment portfolios selected.
- SURF has not guaranteed any investment returns, nor made any representations about the accuracy or suitability of these portfolios to your unique profile and circumstances.
- By selecting the member investment, your current retirement savings and/or future contributions will be invested in your chosen portfolio(s).

Your current retirement savings and/or future contributions may be invested in one or more of the following portfolios. Your investment selection must be allocated in percentage terms (minimum of 10% per portfolio) and the percentage allocation should have no decimal points.

MEMBER INVESTMENT PORTFOLIO(S) SELECTION	SWITCH CURRENT RETIREMENT SAVINGS	CHANGE FUTURE CONTRIBUTION SELECTION
Sygnia Signature 40	%	%
Sygnia Signature 50	%	%
Sygnia Signature 60	%	%
Sygnia Signature 70	%	%
Sygnia Skeleton 40	%	%
Sygnia Skeleton 50	%	%
Sygnia Skeleton 60	%	%
Sygnia Skeleton 70	%	%
Sygnia Synergy 40	%	%
Sygnia Synergy 50	%	%
Sygnia Synergy 60	%	%
Sygnia Synergy 70	%	%
Sygnia Signature 40 Pro	%	%
Sygnia Signature 50 Pro	%	%
Sygnia Signature 60 Pro	%	%
Sygnia Signature 70 Pro	%	%
Sygnia Skeleton 40 Pro	%	%
Sygnia Skeleton 50 Pro	%	%
Sygnia Skeleton 60 Pro	%	%
Sygnia Skeleton 70 Pro	%	%
Sygnia Skeleton Absolute Fund	%	%
Allan Gray Global Balanced	%	%
Coronation Global Balanced	%	%
Foord Balanced	%	%
Ninety One Global Balanced	%	%
Sygnia Islamic Balanced	%	%
M&G Global Balanced	%	%
Sygnia Life Money Market	%	%
TOTAL*	%	%

*If you select more than one portfolio your selection must add up to 100% (minimum of 10% per portfolio).

MEMBER DECLARATION

I, the undersigned member, acknowledge, understand and accept the following:

- SURF may use the information I have provided in this form to effectively process my transactions, detect and prevent fraud, comply with auditing and record-keeping requirements, comply with legal and regulatory requirements, verify my identity and/or share information with service providers with whom SURF has a business agreement to process such information on SURF's behalf or to those who render services to SURF.
- It is my responsibility to ensure that my investment switch instruction is submitted to SURFadmin@srf.sygnia.co.za timeously. If I have not received confirmation of receipt, the investment switch instruction may not have been received and therefore not been actioned by SURF.
- My investment switch instruction may not be actioned if I do not provide all required information or if the information is inaccurate and/or illegible. My investment switch instruction will only be actioned once a correct, valid investment switch instruction has been received by SURF.

Signed at: _____ on this _____ day of _____ year _____

Signature of member: _____