

Policy

Switch instruction form



Important information

Complete all relevant sections of this form and submit it to retirement@prescient.co.za or fax to 021 700 3700.

- This form allows you to switch the underlying portfolio that you are currently invested in.
- The Administrator will act upon instruction on this form based on the units, percentage or amount indicated on the switch instruction below.

Cutoff times

We will only process your instruction once we receive all the required documents and the investment amount reflects in our product bank account. Instructions received before 13:00 (SA time) on a business day will be processed on the same day. Any instruction received after 13:00 on a business day will be processed on the next business day. Instructions in respect of a money market portfolio must be received by 11:00.

Provide your personal details

Policy number

Full name

ID or Passport number (if foreign national)

Switch options

Select the appropriate portfolio and the percentage or rand value to be switched.

From Investment Option	Units, Amounts or Percentage	To Investment Option	Units, Amounts or Percentage

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

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

Indicate your new debit order allocation below:

Investment portfolio	Amount	Percentage
	R	%
	R	%
	R	%
	R	%
Total	R	%

2. Your existing withdrawal on your **Endowment Policy** may be affected by your switch instruction. Please select one of the options below:

- Regular withdrawal to remain the same
- Cancel regular withdrawal
- Change regular withdrawal (complete the section below)

Investment portfolio	Withdrawal Amount or Percentage

3. Your **Living Annuity Policy** income payment (if applicable) may be affected by your switch.

Would you like to withdraw from the same investment portfolio(s) as you currently do? Yes No

- If you would like to change which investment portfolio(s) you draw your income from, select one of the following options below (this automatically replaces your existing annuity income allocation).
- You may only change the investment portfolio(s) from which you want to withdraw your income. Your percentage income and payment frequency may only be changed on your anniversary date.

- Annuity income to be withdrawn proportionately across all investment portfolios after the switch.
- Annuity income to be withdrawn from the investment portfolio(s) (complete the section below).

If there is insufficient money in the selected investment portfolio(s), we will withdraw the income proportionately from all investment portfolios.

Investment portfolio	Withdrawal Amount or Percentage

Authorisation and declaration

- I confirm that all information provided on this form is correct.
- I have not received advice from the Administrator regarding this instruction.
- I confirm that my appointed financial advisor may have access to my investment details via the secure section of the Administrator's website or via a secure electronic channel at my financial advisor's request.
- I have read, understood and agree to the latest Terms and Conditions which I understand may have changed since my original investment.

Investor / Mandate Intermediary

Full name	<input type="text"/>	Signed at	<input type="text"/>
Date	<input type="text" value="DDMMYYYY"/>	Signature of investor	<input type="text"/>