nörrenberger Pensions

Write in Capital Letters Only /Black Ink Only

MULTI FUND TRANSFER REQUEST

CLIENT BIO DATA

*PIN P E N

*Surname: *First Name:

*Middle Name:

*Date of Birth: dd mm yy

*Phone Number:

*Employer:

*Location:

FUND TRANSFER OPTION

FUNDS	CURRENT FUND	NEW FUND
RSA FUND I (Strictly by choice for contributors below 50 years)		
RSA FUND II (Default Fund for contributors below 50 years)		
RSA FUND III (Age 50 and above)		
RSA FUND V (Conservative)		
RSA FUND V (Aggressive)		
RSA FUND VI (Non-Interest Fund)		

NOTES

- A contributor in active service who is ≥ 50 years as at last birthday can choose to migrate between Fund III and Fund II only.
- A contributor in active service who is below ≤ 50 years as at last birthday can choose to migrate between Fund II and Fund I only.
- Fund IV contributors can only move to Retiree Fund V.
- Fund VI (The Non-Interest Fund is suitable for contributors with preference for investments based on Islamic Finance principles.)

I want to receive e-statements: ☐ No ☐ Email Address: .....

DECLARATION

By Signing this form I .....

- Declare that I have a clear understanding of the Multi-Fund Structure. I have read applicable terms & conditions and consent that my Retirements Savings Account (RSA) be transferred between Funds as indicated above.
- I authorize Norrenberger Pensions Limited to carry out instructions on this form in accordance to the provisions of the PRA 2014 and guidelines of the Multi-fund Structure, as amended from time to time.
- I understand that the choice of Fund is wholly my decision and my PFA is required to follow my instruction.I note that Norrenberger Pensions Limited may, based on PenCom Guidelines, amend the choice of funds at any time and there may be circumstances where my investments are switched to a different fund.
- I understand that the value of investments may change based on performance of investible instruments.

Signed ---------- Date ----------

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