



Private Bag X14, Highveld Park, 0157

administered by Sanlam

## MUNICIPAL GRATUITY FUND

### INVESTMENT PORTFOLIO SELECTION

Please PRINT all details

PERSONAL PARTICULARS											
Council						Pension number					
Surname						Initials			Title		
Full Names											
Identity number										Internal postal point	
Residential address						Postal address					
Tel number (Home)						Tel number (Work)					
Cell phone number						E-mail address					
Occupation						Preferred method of communication					

#### 1. I agree to the following:

- The submission of this option form is irrevocable.
- The option may not be backdated.
- Sanlam Corporate: Retirement Fund Administration (RFA) will process an investment instruction within 5 working days of receipt of the completed application in the prescribed format.

Confirmation of the implementation of my investment choice will be sent via SMS to the cellular phone number below. If I have not received such confirmation within four working days from submission of my form, the responsibility is upon me to contact the Fund Administrator, Sanlam Corporate on (012) 683-3900 to do a follow-up. Record will be kept by the Fund Administrator of SMS messages.

Cellular phone number (compulsory) : .....

I hereby indemnify the MGF against any claim for compensation due to late or non implementation, if I cannot prove that I have followed up the non receipt of the SMS message.

The first investment change each calendar year is free. Subsequent changes in the same calendar year will be charged at R1031.00 exclusive of VAT.

- The cost of amending my investment portfolios will be recovered from my member value.
- I must keep a copy of this completed investment form for record purposes.
- Information relating to the portfolios on the investment choice menu, their performance and any amendments thereto will be maintained on the Fund's website [www.mymgf.co.za](http://www.mymgf.co.za) and will constitute the method of communication of investment related information with members.

**2. Please amend my current investment choice as indicated below (maximum 2 portfolios):**

**PORTFOLIO SELECTION**

NAME OF PORTFOLIO	PENSION FUND % ALLOCATION	
	Current Choice	New Choice
Aggressive Portfolio		
Moderate Portfolio		
Conservative Portfolio		
Protected Portfolio		
Life Stage Model (100%)		
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>

**3. If your monthly contributions should be invested in a different portfolio, please choose ONE portfolio below (100% of your contributions):**

Aggressive Portfolio	
Moderate Portfolio	
Conservative Portfolio	
Protected Portfolio	

If you do not have a Financial Adviser and require assistance with your portfolio selection, please contact (012) 683 3422.

**4. I hereby declare that:**

- I have initialed page 1 as proof that I agree to the investment choice, switch terms and conditions.
- I declare that I understand the risk profile of the investment portfolio/s of my choice and I have taken financial advice from a FAIS-accredited Adviser or confirm that I have a good understanding of investments and do not need the services of a Financial Adviser.
- I understand that the onus is on me to ensure that RFA receives the investment instruction and if RFA does not acknowledge receipt of the instruction, then the switch may not take place.
- I understand that should the form be incomplete or inaccurately completed, the instruction may not be actioned by RFA.
- I declare that I understand the implications of my choice.
- I indemnify the Fund, the Trustees, the Principal Officer of the Fund, the Assurer and RFA against any claim arising from my investment portfolio choice.

Signed at ..... on .....

.....  
Full name and surname

.....  
Signature

**Fax or e-mail completed forms to Sanlam Corporate:**

West End Office Park, Block D, 250 Hall Street, Centurion, 0157  
Private Bag X14, Highveld Park, 0169  
Call Centre Tel: (012) 683 3900, Fax: 086 613 5040/30/34  
E-mail: SEBMemberSwitches@sanlam.co.za