



ACTIVE MEMBERS, DEFERRED MEMBERS OR LIVING ANNUITANTS

“Own Mix Election” Application Form

Please ensure that you are using the most recent version of this form by contacting the Unilever Pensions Team prior to submitting the form (*Effective Date – 1 August 2017*)

E-mail the completed form to Alexander Forbes at zzswitches@aforbes.co.za alternatively fax it on (011) 263 2948

Member Details:

Effective month of election _____ Employee Number _____

Initials & Surname _____ Date of Birth _____

ID Number _____ Member Status **Active / Deferred / Annuitant**
(delete whichever is not applicable)

Portfolio Asset Allocation

Investment channel	Fund Credit %	Contribution %	Restrictions
Unilever SA Bonds			No limitation
Unilever SA Cash			No limitation
Capital Growth Portfolio			No limitation
Income Protection Portfolio			No limitation
Stable Growth Portfolio			No limitation
Moderate Growth Portfolio			No limitation
OR			
With-Profit Pension Lifestage (Default)		N/A	Cannot be combined with other portfolios
OR			
Investment Linked Annuity Lifestage		N/A	Cannot be combined with other portfolios
TOTAL	100%	100%	

Declaration

- A fax confirmation slip does not constitute sufficient proof of receipt by Alexander Forbes. I understand that the onus is on me to ensure that Alexander Forbes receives the switch instruction and if Alexander Forbes does not acknowledge receipt of the switch instruction within 5 working days, then the switch may not take place. **I understand that should the form be incomplete or inaccurately completed, the switch instruction may not be actioned.**
- I have read and understood the contents of the **Investment Choice Guide** in particular in relation to the issues associated with selecting an own choice portfolio. I declare that I understand the risk profile of the investment portfolio of my choice and that I have obtained advice where appropriate. I declare that I understand the implications of my choice.
- I indemnify the Fund, the Trustees, the Principal Officer of the Fund, my Employer and Alexander Forbes against any claims whatsoever arising from my investment portfolio choice.

Any corrections to information completed on the form must be initialled by the member.

<p>_____</p> <p style="text-align: center;">SIGNATURE</p> <p>Home Tel No. _____</p> <p>Cell No. _____</p> <p>E-mail Address _____</p> <p>Postal Address _____</p>	<p>_____</p> <p style="text-align: center;">DATE</p> <p>Work Tel No. _____</p> <p>Fax No. _____</p>
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