

## Sanlam Umbrella Fund

### Member investment selection form for the following members:

#### Paid-up, Phased Retiree and Extended Range In-fund Living Annuitant

This form must be completed by members who wish to make application to select their own investment portfolios or who wish to change the portfolios already selected. Members can select the investment portfolios in respect of their existing investments. This document serves as an official investment selection instruction to Sanlam Corporate.

**Please note:** *If you have selected the Trustee-endorsed In-fund Living Annuitant option, the member investment choices below will not apply to you. Your member share is wholly invested in the Trustee-endorsed Sanlam Capital Protection Portfolio.*

### Member's personal particulars

Title and initials <input type="text"/>	Full names and surname <input type="text"/>		
ID nr / Passport nr <input type="text"/>	Date of birth <input type="text"/>	Income tax number <input type="text"/>	Member number <input type="text"/>
Home language <input type="text"/>	Gender <input type="text"/>	Marital status <input type="text"/>	
Contact number (mobile) <input type="text"/>	Contact number (cell) <input type="text"/>		
E-mail address ( <i>this will be our main means of communicating directly with you</i> ) <input type="text"/>			

I agree to the following investment choice and switch terms and conditions:

- Sanlam Corporate will implement an investment instruction when they have received a completed application in the prescribed format, registered the member's request to make his or her own investment choice selections and have confirmed to the member receipt of the investment instruction form.
- I understand that should the form be incomplete or inaccurately completed, the instruction may not be actioned by Sanlam Corporate.
- If I have not received a confirmation of receipt within 5 days I must make enquiries as my request may not have been received and processed.
- An investment instruction will be implemented within 5 working days of confirmation of receipt.
- Queries regarding the progress of an investment selection instruction must be directed to the call centre on 086 122 3646
- Information relating to the portfolios on the investment choice menu, their performance and any amendments thereto will be maintained on the Sanlam Corporate Member Portal (<https://cp.sanlam.co.za/>) and will constitute the method of communication of investment related information with members in addition to the annual benefit statement.
- If I switch from the Volatility Protection Strategy, or any other smoothed bonus portfolios, the rules of the specific product will apply. In certain instances the disinvestment(s) may be done at the lower of market- and book value.

I hereby make application to make my own investment choice and ask that my existing investments be invested as follows (choose up to a maximum of 4 portfolios):

	<b>Portfolios</b>	<b>% per portfolio</b>
<b>Single manager range</b>	SIM Balanced Fund	%
	SIM Moderate Absolute Fund	%
	SIM Cash Fund	%
	SIM Temperance Balanced Fund	%
	SPW Balanced Fund	%
<b>Multi-manager range</b>	SMM 70 Portfolio	%
	SMM 50 Portfolio	%
	SMM 30 Portfolio	%
	SMM Moderate Absolute Fund	%
	SMM NUR Balanced Fund	%
	SMM Select Balanced Fund	%
	Sanlam Accumulation Portfolio	%
	Sanlam The Most Aggressive Portfolio	%
	Sanlam Wealth Creation Portfolio	%
	<b>Portfolios</b>	<b>% per portfolio</b>
<b>External Single Manager range</b>	Allan Gray Global Balanced Portfolio	%
	Coronation Houseview Portfolio	%
	Ninety One Balanced Fund	%
	PSG Balanced Fund	%
	Kagiso Balanced Fund	%
	Sanlam Foord Balanced Fund	%
	Sanlam Prudential Balanced Fund	%
	Truffle Balanced Fund	%
<b>Smoothed Bonus range</b>	Sanlam Monthly Bonus Fund	%
	Sanlam Stable Bonus Portfolio	%
	Sanlam Progressive Smooth Bonus Fund	%
<b>Index-tracking range</b>	Satrix Enhanced Balanced Tracker Fund	%
		<b>Total 100%</b>

**I hereby declare that:**

1. I have taken financial advice.
2. I have a good understanding of investments and do not need the services of a financial adviser.
3. I understand the risks in selecting my own investment portfolios and am satisfied that my selection serves my needs, and
4. I take full responsibility for my choices and hereby indemnify and undertake not to hold the Sanlam Umbrella Fund, the Board of Trustees, my employer, Sanlam Life Insurance Limited (acting herein through its Sanlam Corporate division), its agents, directors, officers and any entity in the Sanlam Group of Companies responsible for any losses or damages that may result from the investment portfolios I select.

Signed at \_\_\_\_\_ on \_\_\_\_\_ ccy \_\_\_\_\_

\_\_\_\_\_  
**Member's Signature**

**Disclaimer:**

Personal Information (PI) requested in this form is mandatory for operational and administrative processes, and to comply with regulatory requirements. If the mandatory information is incomplete, your request may not be processed. Sanlam Life Insurance Limited will take reasonable steps to ensure that the PI collected on this form is processed responsibly, kept safe and confidential, and does not unjustifiably infringe your privacy. You can read the Sanlam Privacy Notice on <https://www.sanlam.com/legal/pages/sanlams-privacy-policy.aspx> ; it can be sent to you on request. You can update your contact details by registering and logging onto our member portal here: <https://cp.sanlam.co.za> or email: [SCClientCare@sanlam.co.za](mailto:SCClientCare@sanlam.co.za) or call: 086 122 3646.

**Financial Adviser particulars**

Initials and surname:			
FAIS license number:		Office telephone number:	
E-mail address:		Cell phone number:	

Signed at \_\_\_\_\_ on \_\_\_\_\_ ccy \_\_\_\_\_

\_\_\_\_\_  
**Financial Adviser's Signature**

**Please e-mail the completed documentation to:** [sanlamumbrellafund@sanlam.co.za](mailto:sanlamumbrellafund@sanlam.co.za)

Member  
quick access  
self-service



**Get in touch with your  
retirement information**

Sanlam's member self-service options on the Website and the free Mobile App provide easy and quick access to important information regarding your retirement savings and benefits. You are also able to submit your requests via the Web or App.

Go to <https://cp.sanlam.co.za/> to register or contact your employer for assistance.