

INFUND TRANSFER FROM SAVINGS COMPONENT TO RETIREMENT COMPONENT

To be completed by employer and member

- All sections must be completed in full using BLOCK LETTERS.
- Please indicate all options selected by means of a cross (X).
- To enable Acravest to process this form, please ensure that it is completed in full and that the information provided is accurate.
- Please sign next to any amendments made on this form.

REQUIRED DOCUMENTATION

The following outlines the supporting documentation required in terms of the Financial Intelligence Centre Act, No 38 of 2001 (FICA) as well as other documents required by Acravest. This documentation is necessary in order for the Fund to verify the details in this application

- Copy of ID or Passport
- Proof of SA income tax number
- Proof of residential address

(Copies of the supporting documentation are sufficient as long as all text and photographs are clear and legible).

IRETIRE FUND DETAILS

Fund name Registration number

Participating Employer (If Applicable)

INVESTOR /MEMBER DETAILS

New investor Existing investor

Full names

Surname

ID or Passport number (if foreign national) Gross Annual Salary

Are you a registered tax payer Yes No

If yes, specify income tax number

Date of birth

Telephone number Cellphone number

E-mail address

DETAILS OF TRANSFER

Amount to be transferred R

DECLARATION BY INVESTOR

I understand that the onus is on me to ensure that the transfer instruction is received by Acravest and if Acravest does not acknowledge receipt of the instruction within five working days, then it is my responsibility to follow up with Acravest.

I understand that if the instruction is not completed in full, or inaccurate, the instruction may not be processed until the instruction is completed in full and accurate.

I understand that a transfer from the savings component to the Retirement component cannot be reversed. The Retirement component is only available at actual retirement and may only be converted into a life-long annuity.

MEMBER SIGNATURE

Date