

## Pot-to-pot transfer form – move benefits to your retirement pot



### Why do I need to complete this form?

Because you want to move some of your retirement benefits from your vested or savings pot to your retirement pot. It is important that you understand your options and make the right decision for you and your financial wellbeing.

Name of fund

Name of employer / paypoint (if applicable)



### What are my options?

- Move retirement benefits from my vested pot to my retirement pot.
- Move retirement benefits from my savings pot to my retirement pot.

#### Something to consider before you transfer your money to your retirement pot.

Once your money has been transferred to the retirement pot, you cannot access it at all until retirement.

You can't take any of your retirement benefits in your retirement pot as cash when you withdraw from the fund.



#### Note:

1. You can move money from your vested or savings pot to your retirement pot at any time during the year. However, you are only allowed one transfer every tax year.
2. You must transfer the total value of your vested or savings pot to your retirement pot. You can't transfer a portion of these benefits.
3. Once the money is in the retirement pot, the transfer can't be reversed.
4. The completed form must be sent to the fund at least 14 working days before your exit from the fund to process the changes. If this is not done on time, the change will not be processed.



I have received retirement benefit counselling and understand the different options that I may choose and the implications of these options.

☐ Yes ☐ I elected not to receive retirement benefit counselling

If you need help choosing or understanding your options, please contact your dedicated financial adviser or ask your employer if unknown. Alternatively, you can contact Alexforbes. We also encourage you to visit the My Money Matters website to get more information on the options available to you. [Click here](https://mymoneymatters.alexforbes.com/) (<https://mymoneymatters.alexforbes.com/>)

Telephone: 0860 100 444 | Email: [iac@alexforbes.com](mailto:iac@alexforbes.com)

If you want us to call you back [Click here](https://kfta.app.alexanderforbes.co.za/TotalAgility/Forms/Digital/Contact_Us.form) ([https://kfta.app.alexanderforbes.co.za/TotalAgility/Forms/Digital/Contact\\_Us.form](https://kfta.app.alexanderforbes.co.za/TotalAgility/Forms/Digital/Contact_Us.form))

## Section 1 | About you (the member)

### Fill in the details below

Your name(s)

Your surname

Identity or passport number

Date of birth

#### Residential address

Unit number

Complex name

Street number

Street or farm name

Suburb

City or town

Country

Code

Postal address (Tick yes if your postal address is the same as residential address)

Yes ☐

Code

#### Contact details

Please give us your **personal** (not professional) contact details.

Cell

Home

Email

#### Tax details

Income tax number

Country of residence for tax purposes

## Section 2 | Move your money to the retirement pot

### Choose one or both options below:

Transfer all (100%) my retirement benefits from the vested pot:

☐

Transfer all (100%) my retirement benefits from the savings pot:

☐

## Section 3 | Your declaration (the member)

Please read and sign that you agree with the following:

I confirm that:

- I understand my options and the implications of transferring money to my retirement pot.
- If there is any loss suffered as a result of you providing us with incorrect information, neither Alexforbes nor the fund are responsible for the losses.
- I made my own decision or I was assisted by an adviser.

Full name

Signature \_\_\_\_\_

Date

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### Personal information, privacy and security

**Find out** how we protect your personal information, privacy and security. (<https://invest.alexforbes.com/za/en/global/popia-clause>)