LIFE AND RETIREMENT FUND PRODUCTS

SWITCH INSTRUCTION

CORONATION
TRUST IS EARNED™

- Initial any amendments made to this instruction.
- Ensure that all information provided is accurate.
- No instruction will be processed unless all requirements have been met.
- Only 1 investment per switch form is allowed.
- The daily cut-off for receipt of instructions is 14h00; transactions will be processed on the same day and priced on the next business day.
- Forward your instruction to 086 206 4098 or eflows@coronation.co.za
- Should you have any queries regarding this instruction, please contact the Coronation Client Service Centre on 0800 22 11 77.

A: INVESTOR DETAILS

Full name: ______________________________

Client number: 104104 ____________________ Investment number: ____________________

ID/passport number (if foreign national): ______________________________

Contact telephone number: (______) ____________________ Email address: ____________________

B: SWITCHING INSTRUCTION

The Retirement Annuity and Preservation Funds require that your investment adheres to the following limits: a maximum exposure of 75% of the investment amount to equity investments; 30% to international investments; 25% to property. In order to assist you to determine whether your selection of investment options complies with the above-stated limits, you can contact the Client Service Centre on 0800 22 11 77 or use the Quotes tool available on our website www.coronation.com. The available investment options may change from time to time.

Product

☐ Coronation Preservation Pension Fund ☐ Coronation Retirement Annuity Fund ☐ Coronation Living Annuity*

☐ Coronation Preservation Provident Fund ☐ Coronation Endowment Plan

*(100% switches may be delayed if your request coincides with the monthly annuity payment run)

Kindly switch my investment option(s) in the above investment as follows: If yes, please specify the cash lump sum amount:

SWITCH 1

From:

FUND NAME	Amount	or	% of existing investment
	R	or	%

To:

FUND NAME	Amount	or	% of existing investment
	R	or	%
	R	or	%
	R	or	%
	R	or	%

Coronation Life Assurance Company Limited | Life Licence Number: 10/10/1/0188 | SARS Registration Number: 1999/005510/06
Coronation Retirement Annuity Fund | FSCA Registration Number: 12/8/37654 | SARS Approval Number: 18/20/4/041867
Coronation Preservation Pension Fund | FSCA Registration Number: 12/8/37653 | SARS Approval Number: 18/20/4/041868
Coronation Preservation Provident Fund | FSCA Registration Number: 12/8/37643 | SARS Approval Number: 18/20/4/041869
A policy issued by Coronation Life Assurance Company Limited, a licenced insurer under the Insurance Act, No.18 of 2017

SWITCH 2

From:

FUND NAME	Amount	or	% of existing investment
	R	or	%

To:

FUND NAME	Amount	or	% of existing investment
	R	or	%
	R	or	%
	R	or	%
	R	or	%

SWITCH 3

From:

FUND NAME	Amount	or	% of existing investment
	R	or	%

To:

FUND NAME	Amount	or	% of existing investment
	R	or	%
	R	or	%
	R	or	%
	R	or	%

SWITCH 4

From:

FUND NAME	Amount	or	% of existing investment
	R	or	%

To:

FUND NAME	Amount	or	% of existing investment
	R	or	%
	R	or	%
	R	or	%
	R	or	%

All funds listed above refer to the A-Class of the respective funds, except for Bond Fund and Smaller Companies Fund which refer to the R-Class, and Resources Fund and Industrial Fund which refer to P-Class.
***Coronation reserves the right to apply additional trading provisions on instructions for the global feeder funds. Refer to General Information and Conditions for more detail. These funds are made available subject to exchange control limits and may be temporarily closed from time to time.**

Coronation Life Assurance Company Limited | Life Licence Number: 10/10/1/0188 | SARS Registration Number: 1999/005510/06
Coronation Retirement Annuity Fund | FSCA Registration Number: 12/8/37654 | SARS Approval Number: 18/20/4/041867
Coronation Preservation Pension Fund | FSCA Registration Number: 12/8/37653 | SARS Approval Number: 18/20/4/041868
Coronation Preservation Provident Fund | FSCA Registration Number: 12/8/37643 | SARS Approval Number: 18/20/4/041869

C: LIVING ANNUITIES - CHANGE ANNUITY PAYMENT

- [ ] New income must be proportional across all funds
- [ ] Income must be paid from a specific fund: ______________________________

D: CHANGE DEBIT ORDER INSTRUCTIONS (IF APPLICABLE)

- [ ] Cancel debit order instructions
- [ ] Do not change debit order instructions
- [ ] Debit order to follow switch instruction

E: CHANGE PHASING IN INSTRUCTIONS (IF APPLICABLE)

- [ ] Cancel phase in instructions
- [ ] Do not change phase in instructions
- [ ] Phase in to follow switch instruction

F: FINANCIAL ADVICE

- [ ] I did not receive financial advice about this investment.
- [ ] I have received financial advice, but do not require Coronation to pay fees on my behalf.
- [ ] I have received financial advice from the financial adviser listed in this section. I instruct Coronation to deduct the following advice fees to pay the adviser on my behalf.

Initial advice fee: __________ % (Negotiable to a maximum 3%, exclusive of VAT). Applied to each deposit and deducted before the investment is made.

Annual advice fee: __________ % per annum of the market value of the investment portfolio, deducted and paid monthly in arrears. (Negotiable to a maximum 1% exclusive of VAT. If an initial advice fee greater than 1.5% is selected, then the maximum annual advice fee is 0.5%.)

This annual advice fee is not part of the normal annual management fee charged by the relevant fund/s. You may revise or terminate financial advice fees by written notice to us.

Signature of investor/member or authorised signature: SIGN WITHIN THE BOX

Date: __________ [d] / ________________ [m] / _________ [y]

Coronation Life Assurance Company Limited | Life Licence Number: 10/10/1/0188 | SARS Registration Number: 1999/005510/06
Coronation Retirement Annuity Fund | FSCA Registration Number: 12/8/37654 | SARS Approval Number: 18/20/4/041867
Coronation Preservation Pension Fund | FSCA Registration Number: 12/8/37653 | SARS Approval Number: 18/20/4/041868
Coronation Preservation Provident Fund | FSCA Registration Number: 12/8/37643 | SARS Approval Number: 18/20/4/041869

G: FINANCIAL ADVISER DETAIL AND DECLARATION

Adviser contact name: ______________________ Company: ______________________

Agent account number: ______________________ Registration number: ______________________

Authorised agent signature: SIGN WITHIN THE BOX

I/We confirm that the applicant's identity and residential address (where applicable) have been appropriately established and verified in terms of Section 21 of the Financial Intelligence Centre Act, No. 38 of 2001, read with the regulations thereto.

Signed at: ______________________ on this __________ day of __________ year __________

Signature of financial adviser: SIGN WITHIN THE BOX

H: SIGNATURE

I have read the appropriate comprehensive fact sheet information available on Coronation's website (www.coronation.com/za/personal/complete-fund-range-fact-sheets). Authorised agent signature.

Signature of investor/member authorised representative*:
* Please forward proof of authorisation

SIGN WITHIN THE BOX

Date: ________ [d] / ____________ [m] / ________ [y]

Coronation Life Assurance Company Limited | Life Licence Number: 10/10/1/0188 | SARS Registration Number: 1999/005510/06
Coronation Retirement Annuity Fund | FSCA Registration Number: 12/8/37654 | SARS Approval Number: 18/20/4/041867
Coronation Preservation Pension Fund | FSCA Registration Number: 12/8/37653 | SARS Approval Number: 18/20/4/041868
Coronation Preservation Provident Fund | FSCA Registration Number: 12/8/37643 | SARS Approval Number: 18/20/4/041869