

SWITCH INSTRUCTION

Life and Retirement Products

CORONATION 

FUND MANAGERS

TRUST IS EARNED

Coronation Life Assurance Company Limited | SARS Registration Number: 1999/005510/06
 Coronation Retirement Annuity Fund | FSB Registration Number: 12/8/37654/R | SARS Registration Number: 18/20/4/041867
 Coronation Preservation Pension Fund | FSB Registration Number: 12/8/37653/R | SARS Registration Number: 18/20/4/041868
 Coronation Preservation Provident Fund | FSB Registration Number: 12/8/37643/R | SARS Registration Number: 18/20/4/041869

- Initial any amendments made to the application form.
- 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 **(021) 680 2250** or **eflows@coronation.co.za**.
- Should you have any queries regarding this application, 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/Company/Trust/Partnership/Close Corporation registration number: _____

Contact telephone number: (_____) _____ E-mail 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; 25% 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:

FUND	FROM		TO
	Rands	Percentage	Percentage
Switch 1		%	%
Switch 2		%	%

FUND	FROM		TO
	Rands	Percentage	Percentage
Switch 3		%	%
Switch 4		%	%
Exit fees may apply to switches from the Coronation Global Emerging Markets Flexible Fund and the Coronation Preference Share Fund			

C CHANGE DEBIT ORDER INSTRUCTIONS (IF APPLICABLE)

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

D CHANGE PHASING IN INSTRUCTIONS (IF APPLICABLE)

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

E FINANCIAL ADVICE FEES

(Please select one option)

Initial advice fee: __ . __ __ %

Annual advice fee: __ . __ __ % per annum of the investment portfolio, charged and paid monthly in arrears.

Please note: Percentages stated above will override previously stated percentages.

Signature of investor/member or authorised representative: _____ Date: ____/____/____

F FINANCIAL ADVISER DETAIL AND DECLARATION

Contact name: _____ Company: _____

Agent account number: _____ Registration number: _____

Authorised agent signature: _____

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: _____

G 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).

Signature of investor/member or authorised representative*: _____ Date: _____ / _____ / _____

** Please forward proof of authorisation.*