

## Member Planned Retirement Date Instruction

### Protection of Personal Information Disclosure

**Why Personal Information is required:** Sanlam Life Insurance Limited ("Sanlam Life"), a subsidiary of Sanlam Limited, will process and protect your personal information as required by relevant laws and the Constitution of the Republic of South Africa ("RSA"). The personal information requested in this form, which may include special personal information is being collected and will be processed for the following purposes:

- underwriting and providing accurate and effective insurance cover and related value-added services;
- member communication;
- market research and statistical analysis;
- verification of the personal information provided;
- to comply with all legal and regulatory requirements, including applicable codes of conduct;
- for operational and administrative processes to protect Sanlam Life's interests.

Failure to provide the mandatory information will prejudice your insurance cover.

**Changing and correcting Personal Information:** You have the right to:

- Request a copy of your personal information as processed by Sanlam Life;
- Ask for an update and/or correction of your personal information;
- Lodge a complaint with the Information Regulator.

Sanlam Life may charge an administrative fee subject to prior notice of any such cost before executing the request for a copy of your personal information.

**Other parties that may receive the Personal Information:**

- We may share your personal information within Sanlam Limited and/or with other service providers where required for any of the purposes listed above, or with third parties where Sanlam Life is lawfully required to do so.
- We may send your personal information to service providers outside the RSA for storage or further processing on Sanlam Life's behalf. We will not send your information to a country that does not have information protection legislation similar to that of the RSA, unless we have a binding agreement with the service provider which ensures that it effectively adheres to the principles for processing of personal information in accordance with the Protection of Personal Information Act, 2013.

For more information, please refer to the [Sanlam Group Privacy Notice](#).

**Member**  
Quick Access  
Self Service



**Get in touch with your  
retirement information**

**Member Support:**

You can update your contact details by registering and logging into our member portal here:

**Web:** <https://cp.sanlam.co.za> **or Email:** [SCClientCare@sanlam.co.za](mailto:SCClientCare@sanlam.co.za) **or Tel:** 086 122 3646

**Important Information**

- This form serves as an official instruction to Sanlam Corporate by a member who is currently invested in Sanlam Lifestage, Passive Lifestage, Sanlam Wealth Creation Lifestage Strategy and Sanlam Blue Lifestage and does not wish to retire at their normal retirement date (as stipulated in the Fund's Rules). The member hereby submits an application to select an alternative planned retirement date of their choice.
- If you want to know more information about the Lifestage Solution, follow this link: [Sanlam Lifestage Solution](#). The brochure is specifically for Sanlam Lifestage. The switching rules of the lifestage models are the same, however they each have a different accumulation portfolio.
- The instruction on this form **does not change** the normal retirement age of the member's current employer.
- Contact IMS on **080 0111 956** or send an e-mail to [IMS@sanlam.co.za](mailto:IMS@sanlam.co.za) for support, guidance or referral to a Financial Adviser.

**SECTION A: Member's personal details**

Title			
Full name(s)			
Surname			
RSA identity number*		<i>*Compulsory</i>	
If not RSA, passport number*		<i>*Compulsory (if RSA ID used)</i>	
Date of birth (dd/mm/yyyy)		<i>*Compulsory if Passport number is used</i>	
Employer name			
Member number			
Contact number(s)	Cell phone	Alternative	
Email			

**SECTION B: Declaration of the new retirement date**

I hereby make application to select my own planned retirement date and declare as follows:

- I am not planning to retire on my normal retirement date (per the Fund's Special Rules) and hereby select my own planned retirement date.
- I understand that my investments will be switched to correspond with the outstanding period to my planned retirement date (i.e. years to planned retirement date) and not the normal retirement date as is currently the case.
- I understand that by providing a new planned retirement date, I may stay in the Accumulation Portfolio for a longer period.

**I hereby elect my planned retirement date as the end of the month in which I attain age:**

Please add an exact age alongside (such as '65')

**SECTION C: Declaration of acknowledgement of the service level agreement****Declaration by the member:**

I, the undersigned member, I hereby agree to the following terms and conditions:

- Sanlam Corporate will implement a planned retirement date when they have received a completed application in the prescribed format, registered the request and have confirmed to me that they have received the Planned Retirement Date 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 need to make enquiries as the request may not have been received and processed.
- Queries regarding the progress of the instruction must be directed to the administrator.

**SECTION D: Declaration of the status of financial advice****Declaration by the member:**

I, the undersigned member, hereby agree with the below section:

1. I have taken financial advice.

**OR**

2. I assert that I have a good understanding of investments and do not need the services of a financial adviser.

I understand the risks in changing my planned retirement date and am satisfied that my change serves my needs, and

I take full responsibility for my choice and hereby indemnify and undertake not to hold the Fund, its Board of Trustees or Sanlam Corporate, its agents, directors, officers and any entity in the Sanlam group of Companies responsible for any losses or any eventuality that may result from the implementation of my planned retirement date.

Member's Signature		Date (dd/mm/yyyy)	
FAIS Accredited financial adviser name and surname		Signature	
Signed at		Date (dd/mm/yyyy)	