

Acumen Preservation Provident Fund

Robson • Savage

**INVESTMENT OPTIONS FOR MEMBERS OF THE  
ACUMEN PRESERVATION PROVIDENT FUND  
MEMBER INVESTMENT SWITCH FORM**

*Please note that this switch option form must be completed and sent to the  
fund administrator, Robson Savage.*

**Please only use fax number: 086 742 8505 or e-mail: [investmentswitches@robsav.com](mailto:investmentswitches@robsav.com)**

**Personal Details**

**Name & Surname** : .....

**Date of Birth / SA ID** : .....

**Member Investment Choice**

The tables below show the available portfolios. Please indicate the percentage of your fund credit to the portfolio(s) you choose.

Conservative portfolio choices	% of fund credit
Alexander Forbes Investments Banker	
Truffle Low Equity	

Moderate portfolio choices	% of fund credit
Alexander Forbes Investments Allan Gray Ltd	
Alexander Forbes Investments Allan Gray Unit Trust Classic Balanced	
Alexander Forbes Investments Coronation Fund Managers	
Alexander Forbes Investments Performer	
Truffle Medium Equity	

Dynamic portfolio choices	% of fund credit
Coronation Managed	
Alexander Forbes Investments Investec Global Balanced	
Old Mutual Profile Edge28	
Truffle High Equity	

Shari'ah compliant portfolio choices	% of fund credit
Alexander Forbes Investments Shari'ah High Growth	

<b>Percentage Total (Must add to 100%)</b>	
--	--

The completed switch form is to be sent to either the fax or e-mail address, indicated above. A fax confirmation slip does not constitute sufficient proof of receipt by Robson Savage. I understand that the onus is on me to ensure that Robson Savage receives the switch instruction sent to the fax number or e-mail address provided. I further understand that, should the form be incomplete or inaccurate, the switching instruction may not be actioned.

I declare that I understand the implications of my choice. I indemnify the fund, the trustees, the Principal Officer and Robson Savage against any claim arising from my written instruction to switch my investment portfolio and the consequences / deviation thereof as set out in this Member Investment Switch Form.

I understand that my switch will be processed within **3** working days of being received by [investmentswitches@robsav.com](mailto:investmentswitches@robsav.com). I understand that I will receive acknowledgement of receipt of my switch within **2** working days of sending it to [investmentswitches@robsav.com](mailto:investmentswitches@robsav.com) and a confirmation letter within **10** working days of the switch date. And that I have **30** days to notify Robson Savage if my switch was not processed.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Telephone No. (Office hours)

\_\_\_\_\_  
E-mail address