



# INTER-FUND TRANSFER INSTRUCTION FORM

### FOR OFFICE USE

Agent Code

Origin. State Code

Please take this as authority to effect transfer of my Retirement Savings Account (RSA) balance from (please select only one of the options below):

1. Fund I to Fund II

2. Fund I to Fund VI

3. Fund II to Fund I

4. Fund II to Fund III

5. Fund II to Fund VI

6. Fund III to Fund II

7. Fund III to Fund VI

8. Fund IV to Fund VI

9. Fund V to Fund I

10. Fund V to Fund II

11. Fund V to Fund III

12. Fund VI to Fund I

13. Fund VI to Fund II

14. Fund VI to Fund III

15. Fund VI to Fund IV

Note that an RSA holder that is up to 50 years of age cannot be in **Fund I**. Without completion of this form, submission of complete retirement documents is constructive notice to move a member from either **Fund I, II or III** to **Fund IV** which is for Retirees. Micro Pension Contributors are limited to **Fund V** and will be required to switch Fund upon engagement in Formal Sector. **Fund VI** is purely an Ethical/ Non-Interest Fund based on choice for both active and retired RSA holders.

RSA Personal Identification Number (PIN)

Surname

First Name

Middle Name

Kindly give reasons below for this transfer request (if any)

.....  
.....

I declare that I understand the Multi-Fund Structure and accept full responsibility for the outcome of the investments made by my PFA on my behalf.

I also accept that the Administration Fee (where applicable) on this transfer will be charged to my RSA.

Last Transfer Date:

RSA Holder (Signature\* & Date)

Customer Service Officer (Signature & Date )