



# How do I transfer my existing savings to AFRIS?

Forms can be tricky, but we are here to help

You may have existing assets in a preservation fund or pension fund money from a previous employer. This step-by-step guide will help you to transfer these assets into AFRIS.



Where your **preservation fund money** is currently sitting



From your benefit statement or paid-up statement obtain the following information:

- > Fund value
- > Registered name of fund
- > Registration number of fund
- > Administrator name
- > Your reference or policy number

**Step 1**



Instruct the current administrator of your preservation fund that you want to transfer your funds to AFRIS. This instruction is usually called a **transfer form** or **claim form**. You need to request this from your current preservation fund administrator.

**Complete this form.**

**Step 2**



Complete the AFRIS preservation fund application form

[Click here](#)

**Step 3**



Send **both** the transfer instruction (or claim form) as well as the AFRIS preservation fund application form to:

- > Your current preservation fund administrator, and
- > Alexforbes at [CSNB@alexforbes.com](mailto:CSNB@alexforbes.com)

**Step 4**



What to attach to your application email to Alexforbes:

- > Proof of residential address
- > Certified copy of ID or passport



If you make use of an **Alexforbes financial adviser**, you can send your forms to them



## Financial adviser

If your financial adviser is AFRIS accredited, they can assist you to transfer your existing savings.

Financial advisers can become AFRIS accredited by emailing us at [alexanderforbesifa@alexforbes.com](mailto:alexanderforbesifa@alexforbes.com)



### Don't have a financial adviser?

Speak to one of our accredited consultants for assistance:

0860 000 381

OR

[mymoneymatters@alexforbes.com](mailto:mymoneymatters@alexforbes.com)



## Engage without advice

Use our step-by-step transfer guide to assist you if you want to:

- keep all your retirement savings from pension or provident funds invested in one place when leaving your employer
- consolidate all your retirement savings from preservation funds and retirement annuities into one solution

Still not managing to transfer your existing savings successfully?

**Don't despair - call us on 0860 66 4444.**

