



INVESTMENT ELECTION GUIDE (CHANGING YOUR FUTURE CONTRIBUTIONS)

PLEASE NOTE that there are two types of investment transactions available:

SWITCH REQUEST: this is when you **switch part or all of your Member Account Balance** from its current investment portfolio to another investment portfolio/s. You can make a switch at any time in the month, and it will usually be completed within 3 to 5 working days. There is no cost to make an investment switch. **To find how to make a SWITCH REQUEST, click [HERE](#)**

INVESTMENT ELECTIONS: this is when you elect to invest your **future Fund contributions** in another investment portfolio/s. There is no cost for making investment elections. If you submit your investment election before the 20th of the month, it will definitely be implemented before the month-end, so your new investment election will apply to that month's contributions. If you submit your investment election after the 20th of the month, your investment election may possibly only be implemented in the following month (depending on the date that payroll is processed by the Administrator in that month). **To find how to make an INVESTMENT ELECTION, read on below.**

It is important to note that these are two separate transactions. If you want to switch both your current Member Account Balance and your future contributions, you must give instructions for BOTH transactions.

How to make **INVESTMENT ELECTIONS** (to change for your **FUTURE CONTRIBUTIONS**)

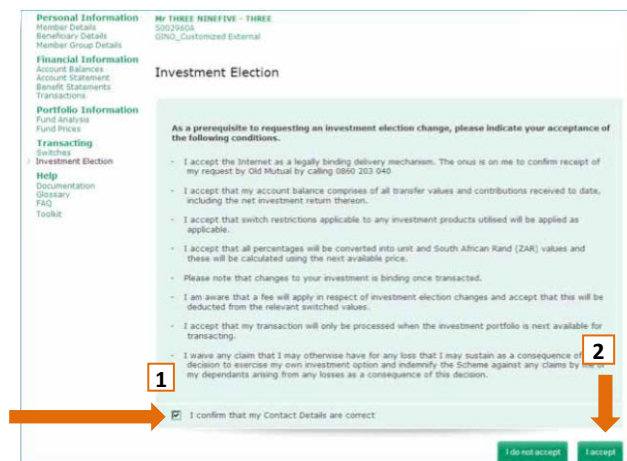
*(Please see the separate guide if you want to know how to make **SWITCH REQUEST** to switch your Member Account Balance)*

1. Login to **Secure Services** (a login link can be found at the top of the homepage of the **OMEGS'** website).
2. Select **Retirement Scheme Administration Transact**. (Note: If you are only able to select an option labelled "Retirement Scheme Administration View", you will need to apply for Transact access – see the guide on the Fund's website for help).
3. Select the **Old Mutual Employee Group in SuperFund**.

4. Select **Investment Election** under the Transacting tab on the left hand menu. You will see the following screen, which displays where your contributions are currently invested. If you want to change the portfolio/s to which your contributions are invested, click on **Update Investment Elections** [1].



5. Read and accept the conditions by clicking on the check box [1] and then click on **I ACCEPT** [2].

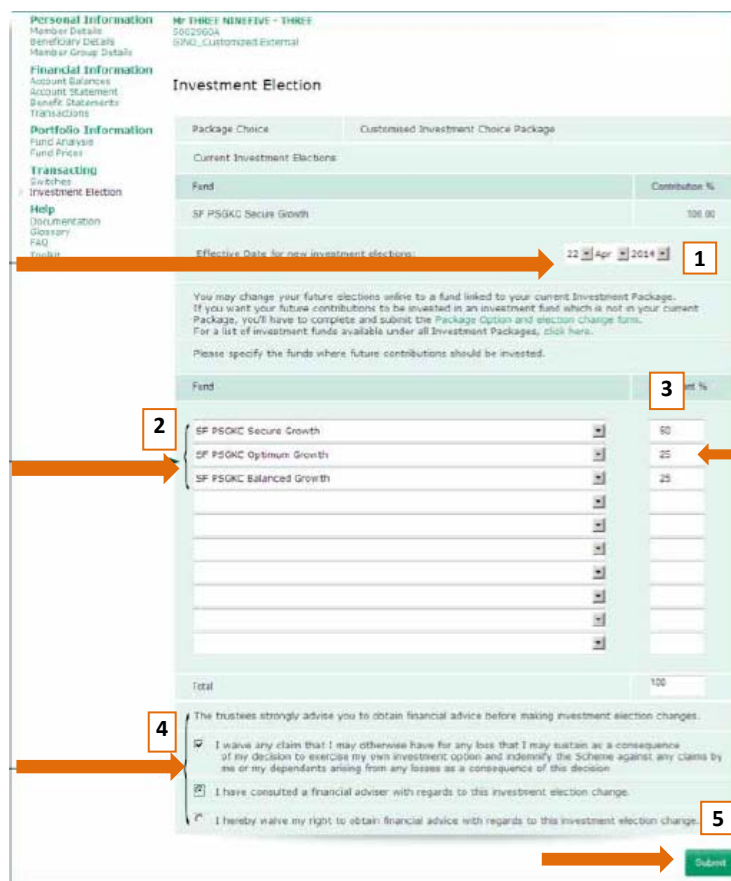


6. The following screen will appear. The table situated at the top displays where your contributions are currently invested.

- You must first choose the 'Effective date for your new investment elections', i.e. from what date do you want your new election to take effect [1].
- You must then indicate how your future contributions should be invested by choosing the fund and the percentage of your contributions you want to invest in [2].

Note: The total must always add up to 100 – remember **not** to include the % sign – just the number! [3]

When you have made your election, tick the check boxes [4] and click **Submit** to proceed [5].



7. This screen displays a summary of your new election [1] as well as the date [2] on which your election will take effect. If you want to go ahead with your elections, click **Confirm** [3].

The screenshot shows the 'Investment Election' screen for Mr. THREE NINEFIVE - THREE (5002960A). The left sidebar contains navigation links: Personal Information, Financial Information, Portfolio Information, Transacting, and Help. The main content area displays the following information:

- Effective Date for new investment elections:** 22-Apr-2014 (indicated by an orange arrow and a box labeled '2').
- Investment Elections:**

Fund	Allocation %
SF PSGKC Secure Growth	50.00
SF PSGKC Optimum Growth	25.00
SF PSGKC Balanced Growth	25.00

An orange arrow points from the bottom of the table to a green 'Confirm' button (indicated by a box labeled '3'). A box labeled '1' is positioned at the top right of the main content area.

8. The next screen displays your investment election and confirms that the **request has been submitted** [1].

The screenshot shows the 'Investment Election' screen for Mr. THREE NINEFIVE - THREE (5002960A). The left sidebar is the same as in the previous screenshot. The main content area displays the following information:

- Effective Date for new investment elections:** 22-Apr-2014.
- Investment Elections:**

Fund	Allocation %
SF PSGKC Secure Growth	50.00
SF PSGKC Optimum Growth	25.00
SF PSGKC Balanced Growth	25.00

A confirmation message at the bottom states: "Your investment election request has been submitted." An orange arrow points to this message (indicated by a box labeled '1').

FREQUENTLY ASKED QUESTIONS:

1) When will my investment election be processed?

Your money will be invested in the new investment portfolio/s on the 1st business day of the following month.

2) How often can I make investment elections?

You can make investment elections (i.e. change the investment portfolio for your future Fund contributions) on a monthly basis.

3) What do I do if I want to cancel my investment election?

You can cancel your investment election by clicking on 'Cancel Investment Election' on the screen that appears when you select 'Investment Election' on the Transacting tab.

4) What is the closing date for making investment elections?

If you submit your investment election before the 20th of the month, it will definitely be implemented before the month-end, so your new investment election will apply to that month's

contributions. If you submit your investment election after the 20th of the month, your investment election may possibly only be implemented in the following month (depending on the date that payroll is processed by the Administrator in that month).

5) Where can I find out what my Accumulated Credit is today?

Select Account Balances under the Financial Information tab in the left hand navigation on the Retirement Scheme Administration Website.

6) Will I receive official notification from the Administrator that my investment election was processed?

Once you have updated your election, you will receive a message on the screen saying that “your investment election request has been submitted”.

7) How much will this investment election cost?

There is no cost for making investment elections.