

Date \_\_\_\_\_

The Manager,  
Fidelity Pension Managers Limited,  
Plot 688, Amodu Tijani Close, Off Sanusi Fafunwa,  
Victoria Island, Lagos.

## MULTI-FUND TRANSFER REQUEST

Having carefully studied and fully understood the concept and contents of the Multi-Fund structure introduced by the **National Pension Commission** (as summarized below), and having weighed and accepted its implications for the growth of my contributions now and hereafter, I hereby request that my retirement savings account (RSA) be transferred from Fund \_\_\_\_\_ to Fund \_\_\_\_\_, in accordance with the approved guidelines.

Fund	Criteria for Transfer	Exposure to variable Income Assets
Fund 1	Subject to contributor's request For active RSA holders below 50 years of age.	20% to 70% of RSA balance
Fund 2	Default fund for active RSA holders 49 years old and below. Can only move to Fund I.	10% to 55% of RSA balance
Fund 3	For active RSA holders 50 years old and above. Can only move to Fund II.	5% to 20% of RSA balance
Fund 4	Strictly for Retirees. Cannot move to any other Fund.	0% to 10% of RSA balance

I understand that I can only move between funds a maximum of twice in a calendar year and that, while the first movement will not attract any charge, a flat rate of N1,000.00 will apply where I request for another transfer in the same calendar year.

I affirm that **Fidelity Pension Managers Limited** and its representatives shall not be responsible for any loss or liability that may arise from my decision to change my fund type in the manner specified above.

Yours faithfully,

**NAME** (Surname first): \_\_\_\_\_

**PHONE NUMBER:** \_\_\_\_\_ **BVN:** \_\_\_\_\_

**PIN** \_\_\_\_\_ **National Identification No.** \_\_\_\_\_

**EMAIL ADDRESS:** \_\_\_\_\_

**Sign:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**For Official Use**

**Checked By: (Name/Sign)** \_\_\_\_\_ **Date** \_\_\_\_\_

**Authorised by: (Name/Sign)** \_\_\_\_\_ **Date** \_\_\_\_\_

