

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) should be transferred from Fund _____ to Fund _____, in accordance with the approved guidelines.

Fund	Criteria for Transfer	Exposure to variable Income Assets
Fund I	Subject to contributor's request. For active RSA holders below 50 years of age.	20% to 70% of RSA balance
Fund II	Default fund for active RSA holders 49 years old and below. Can move to Fund 1 & 6.	10% to 55% of RSA balance
Fund III	For active RSA holders 50 years old and above. Can move to Fund 2 & 6.	5% to 20% of RSA balance
Fund IV	Strictly for Retirees. Can move to Fund 6-Retirees.	0% to 5% of RSA balance
Fund V	Default fund for active RSA holders. Can move to Fund 1, 2 & 3.	0% to 25% of RSA balance
Fund VI	Strictly for Retirees. Can move to Fund 6-Retirees.	0% to 5% 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 _____

Signature _____ Date _____

For Official Use

Checked By: (Name/Sign) _____ Date _____

Authorised By: (Name/Sign) _____ Date _____