

Form matrix

New business and servicing forms

Product	Stock ordering	Key changes on forms	Launch date	Previous form will be accepted until
Application form: Retirement Income Plan	AIRPE 13.08.2022	<ul> <li>Plan name change</li> <li>LifeBooster         re-worded</li> <li>Living Annuity         Protection Benefit</li> </ul>	Saturday 27 August 2022	Friday, 9 September 2022
Application form: Retirement Annuity	ARPE 13.08.2022	<ul> <li>Plan name change</li> <li>Minimum lump- sum contribution changes</li> <li>Remove Flexible Plan Retirement Integrator</li> </ul>	Saturday 27 August 2022	Friday, 9 September 2022
Application form: Endowment	AEPE 13.08.2022	<ul> <li>Plan name change</li> <li>Minimum lump- sum contribution changes</li> <li>Remove Contribution Waiver benefit</li> </ul>	Saturday 27 August 2022	Friday, 9 September 2022
Application form: Flexible Investment	AFIPE 13.08.2022	<ul> <li>Plan name change</li> <li>Minimum lump- sum contribution changes</li> <li>Annual administration fee changes</li> <li>Remove Contribution Waiver benefit</li> </ul>	Saturday 27 August 2022	Friday, 9 September 2022

Discovery Life Investment Services (Pty) Ltd, branded as Discovery Invest, is an authorised financial services provider. Company registration number 2007/005969/07.

August 2022



Application form:	APPE 13.08.2022	•	Plan name change	Saturday	Friday, 9 September
Preserver		•	Minimum lump- sum contribution changes Remove Flexible Plan Retirement Integrator	27 August 2022	2022
Ill-health early retirement: Claim form	N/A	•	Plan name change	Saturday	Friday, 9 September
	NI/A		Dlan name shanga	27 August 2022	2022
Withdrawal form: Tax-free Flexible Investment	N/A	•	Plan name change	Saturday 27 August 2022	Friday, 9 September 2022
Claim form: Retirement Annuity	N/A	•	Plan name change	Saturday 27 August 2022	Friday, 9 September 2022
Death claim form for discretionary and Living Annuity products	N/A	•	Plan name change	Saturday 27 August 2022	Friday, 9 September 2022
Withdrawal form:	N/A	•	Plan name change	Saturday	Friday, 9 September
Endowment				27 August 2022	2022
Withdrawal form:	N/A	•	Plan name change	Saturday	Friday, 9 September
Pension and Provident Preserver				27 August 2022	2022
Withdrawal form:	N/A	•	Plan name change	Saturday	Friday, 9 September
Flexible Investment				27 August 2022	2022
Regular withdrawal form (lump-sum investments only)	N/A	•	Plan name change	Saturday 27 August 2022	Friday 9 September 2022
Annuity - Servicing form	N/A	•	Product name change Enhanced the description for purchase of Vitality	Saturday 27 August 2022	Friday, 9 September 2022
Change of contribution form: Flexible Investment	N/A	•	Plan name change	Saturday 27 August 2022	Friday, 9 September 2022
Change of contribution form: DRO and RA	N/A	•	Plan name change	Saturday 27 August 2022	Friday, 9 September 2022
Change of contribution	N/A	•	Plan name change	Saturday	Friday, 9 September
form: Endowment	17/7		rian name change	27 August 2022	2022
Investment mandate agreement	N/A	•	New form	Saturday 27 August 2022	Friday, 9 September 2022
Living Annuity with boosts for neurological conditions	N/A	•	New form	Saturday 27 August 2022	Friday, 9 September 2022

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