

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 style="list-style-type: none"> Plan name change LifeBooster re-worded Living Annuity Protection Benefit 	Saturday 27 August 2022	Friday, 9 September 2022
Application form: Retirement Annuity	ARPE 13.08.2022	<ul style="list-style-type: none"> Plan name change Minimum lump-sum contribution changes Remove Flexible Plan Retirement Integrator 	Saturday 27 August 2022	Friday, 9 September 2022
Application form: Endowment	AEPE 13.08.2022	<ul style="list-style-type: none"> Plan name change Minimum lump-sum contribution changes Remove Contribution Waiver benefit 	Saturday 27 August 2022	Friday, 9 September 2022
Application form: Flexible Investment	AFIPE 13.08.2022	<ul style="list-style-type: none"> Plan name change Minimum lump-sum contribution changes Annual administration fee changes Remove Contribution Waiver benefit 	Saturday 27 August 2022	Friday, 9 September 2022



Application form: Preserver	APPE 13.08.2022	<ul style="list-style-type: none"> Plan name change Minimum lump-sum contribution changes Remove Flexible Plan Retirement Integrator 	Saturday 27 August 2022	Friday, 9 September 2022
Ill-health early retirement: Claim form	N/A	<ul style="list-style-type: none"> Plan name change 	Saturday 27 August 2022	Friday, 9 September 2022
Withdrawal form: Tax-free Flexible Investment	N/A	<ul style="list-style-type: none"> Plan name change 	Saturday 27 August 2022	Friday, 9 September 2022
Claim form: Retirement Annuity	N/A	<ul style="list-style-type: none"> Plan name change 	Saturday 27 August 2022	Friday, 9 September 2022
Death claim form for discretionary and Living Annuity products	N/A	<ul style="list-style-type: none"> Plan name change 	Saturday 27 August 2022	Friday, 9 September 2022
Withdrawal form: Endowment	N/A	<ul style="list-style-type: none"> Plan name change 	Saturday 27 August 2022	Friday, 9 September 2022
Withdrawal form: Pension and Provident Preserver	N/A	<ul style="list-style-type: none"> Plan name change 	Saturday 27 August 2022	Friday, 9 September 2022
Withdrawal form: Flexible Investment	N/A	<ul style="list-style-type: none"> Plan name change 	Saturday 27 August 2022	Friday, 9 September 2022
Regular withdrawal form (lump-sum investments only)	N/A	<ul style="list-style-type: none"> Plan name change 	Saturday 27 August 2022	Friday 9 September 2022
Annuity - Servicing form	N/A	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Plan name change 	Saturday 27 August 2022	Friday, 9 September 2022
Change of contribution form: DRO and RA	N/A	<ul style="list-style-type: none"> Plan name change 	Saturday 27 August 2022	Friday, 9 September 2022
Change of contribution form: Endowment	N/A	<ul style="list-style-type: none"> Plan name change 	Saturday 27 August 2022	Friday, 9 September 2022
Investment mandate agreement	N/A	<ul style="list-style-type: none"> New form 	Saturday 27 August 2022	Friday, 9 September 2022
Living Annuity with boosts for neurological conditions	N/A	<ul style="list-style-type: none"> New form 	Saturday 27 August 2022	Friday, 9 September 2022