

**ALLAN GRAY GROUP RETIREMENT ANNUITY APPLICATION FORM**

**Member Details**

Title

Surname

First name(s)

Date of birth

ID / passport number

Email Address

Regular contribution amount (min of R500)

Are you transferring your lump sum from another fund?

Yes  No

*Should you select Yes, please request a manual Retirement Annuity application form from HR.*

Do you already have an existing Allan Gray Retirement Annuity Account with available funds?

Yes  No

Should you select Yes, please confirm if you would like to continue with your existing account?

Yes  No

*Should you select Yes, please request a Retirement Annuity continuation application form from HR.*

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

### ONLINE RA APPLICATION PROCESS

1. Once HR has loaded your details on the online portal, you will receive an email with a link to complete the **online Allan Gray RA application form**.
2. Once you click on the link, it will take you to a landing page where you will need to enter your ID number **(A)** and click **“Next” (B)** to open the application.
3. The next page will reflect your monthly contribution and the default fund selection **(C)**.
4. Next, you will complete your **personal, contact and beneficiary details (D)** and click **“Next”**.
5. A summary page will open, and you will need to check all the information you have entered. If everything is in order, you need to **tick the terms and conditions box (F)** and click **“Submit” (G)**.
6. You will then have the option to print the confirmation **(H)** page.
7. Once the application is submitted, you will receive an email containing the **application confirmation, investment overview, conditions of membership and instructions to complete the application**.
8. You will need to submit the **signed application confirmation (I)** along with a copy of your **South African bar-coded ID (J) (or valid passport, if foreign national)** to the HR department.
9. The signed application confirmation **MUST** be submitted to the HR department within no more than a week after receiving the link to complete the **online Allan Gray RA application form**.