



OLD MUTUAL EMPLOYEE GROUP IN SUPERFUND (OMEGS) INVESTMENT ALLOCATION GUIDE

INSURE | BANK | INVEST

OVERVIEW

This guide explains how to change the investment portfolios for your **future Fund contributions** using the Old Mutual Portal.

It does **not** affect your existing Member Account Balance.

Investment Allocation (Future Contributions)

An investment allocation applies to future Fund contributions only.

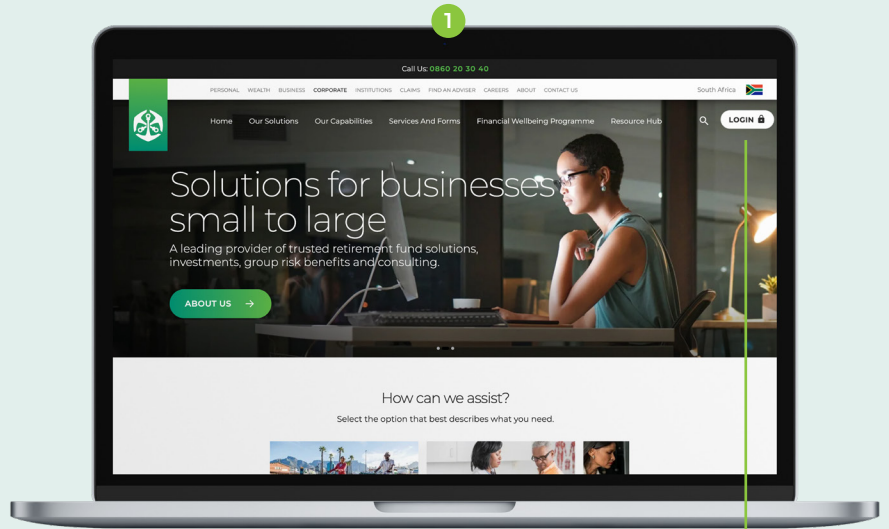
- There is no cost to make an investment allocation.
- If submitted before the **20th of the month**, it will usually apply to that month's contribution.
- Requests submitted after the 20th may only apply in the following month, depending on payroll processing.



HOW TO MAKE INVESTMENT ALLOCATIONS

Step 1: Log in to the Old Mutual Portal

1. Go to oldmutual.co.za and select **login**.
2. Insert your credentials.



Login to Old Mutual

Manage your portfolio, Old Mutual Rewards, Moneyversity, Wealth and Unit Trusts – all in one place.

Username* [Forgot Username?](#)

Password* [Forgot Password?](#)

Login

Register

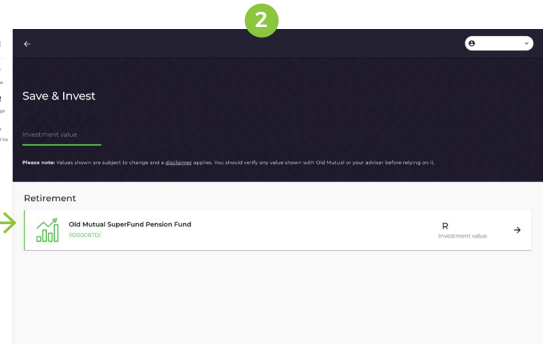
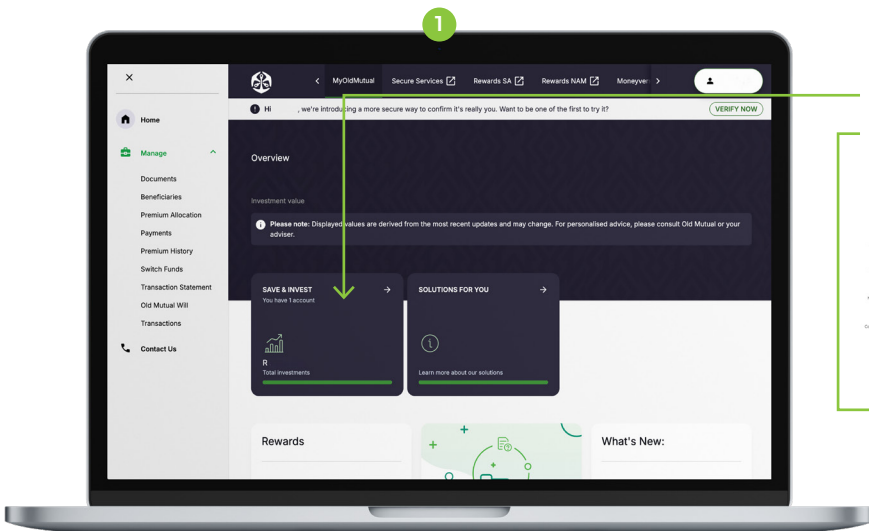
[Need help?](#)

Login to other Old Mutual portals

My Personal Loans	<input checked="" type="checkbox"/>	My OM Insure	<input checked="" type="checkbox"/>	OM Wills	<input checked="" type="checkbox"/>
Money Account Internet Banking	<input checked="" type="checkbox"/>	EGT	<input checked="" type="checkbox"/>	Remichannel	<input checked="" type="checkbox"/>

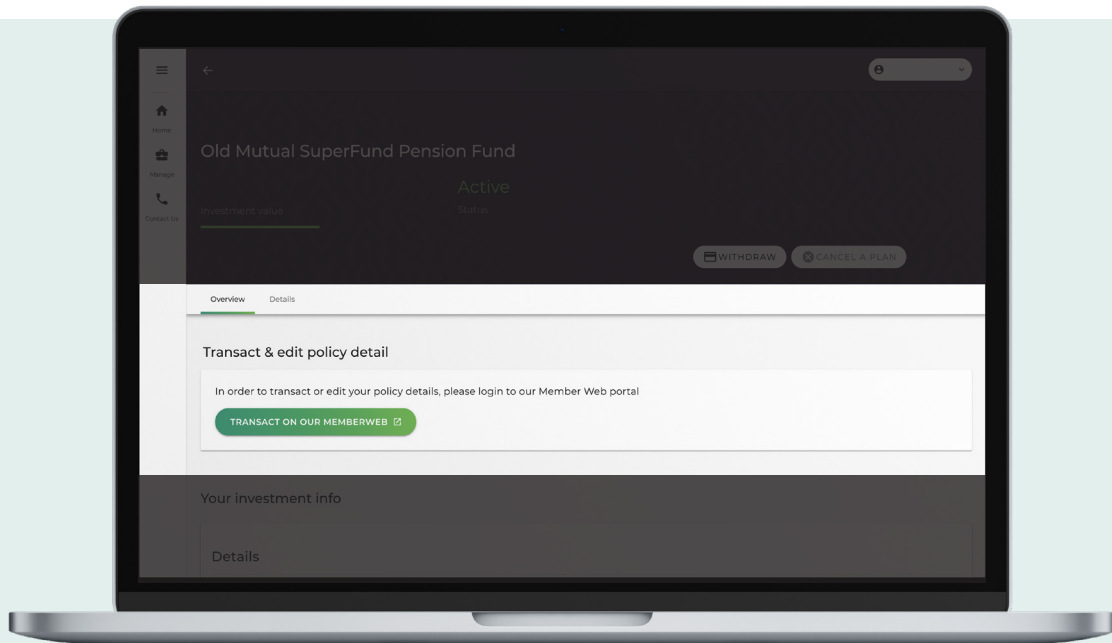
Step 2: Navigate to the MemberWeb

1. Select the **Save & Invest** tile.
2. Select **Old Mutual SuperFund Pension Fund**.



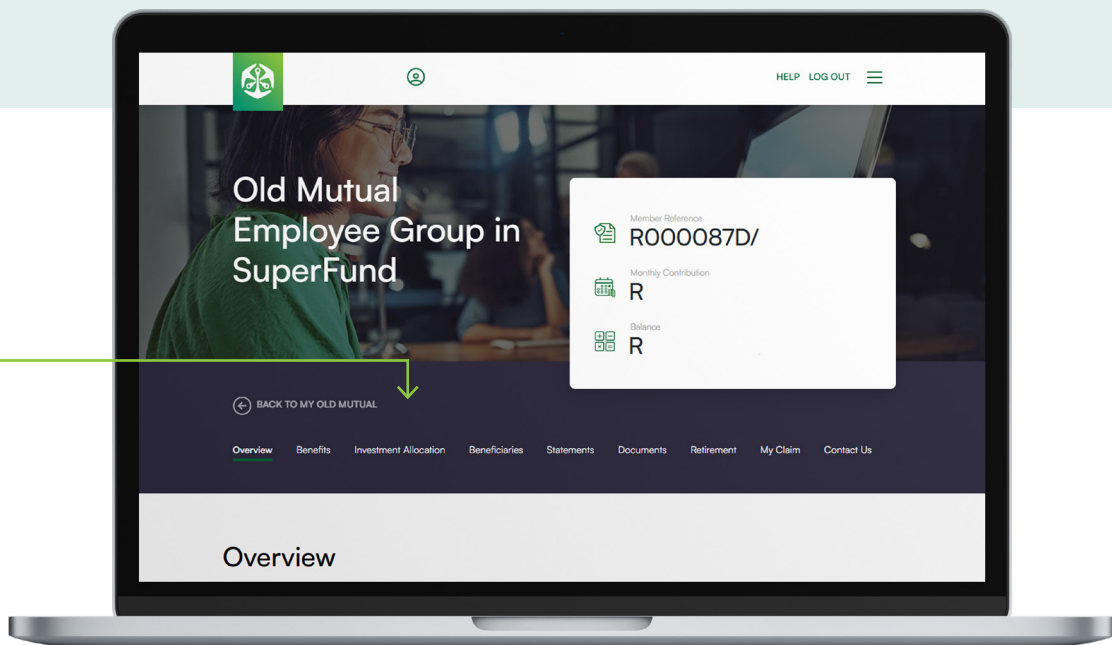
Step 3: Open the MemberWeb

Under **Overview**, select the **Transact on our MemberWeb** button.



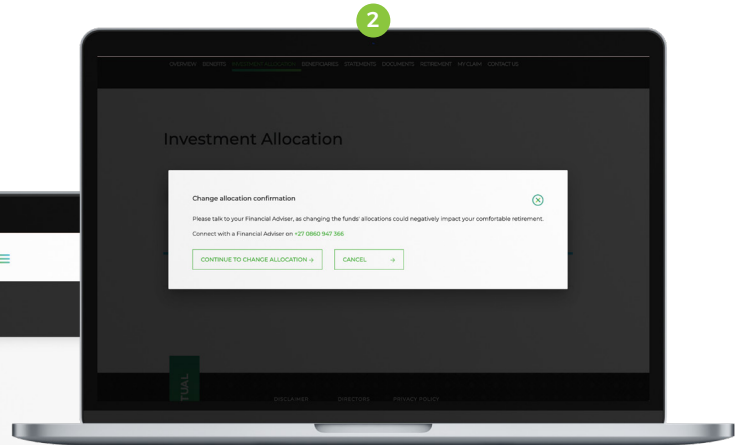
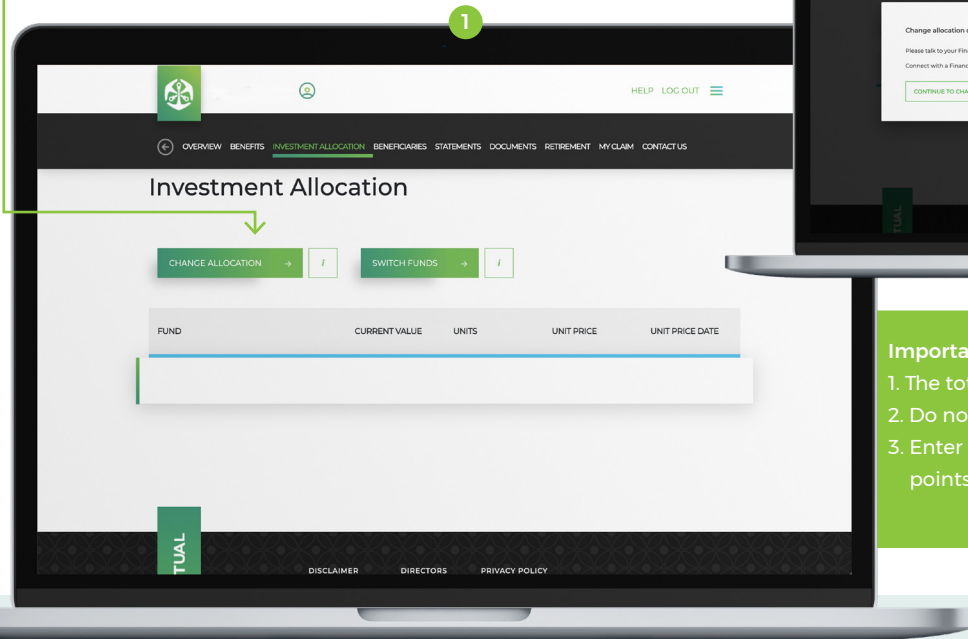
Step 4: Open Investment Allocation

Select **Investment Allocation**.



Step 5: Change Allocations

1. Select **Change Allocation**.
2. Select **Continue to Change Allocation**.
3. Enter the percentage for each selected portfolio.

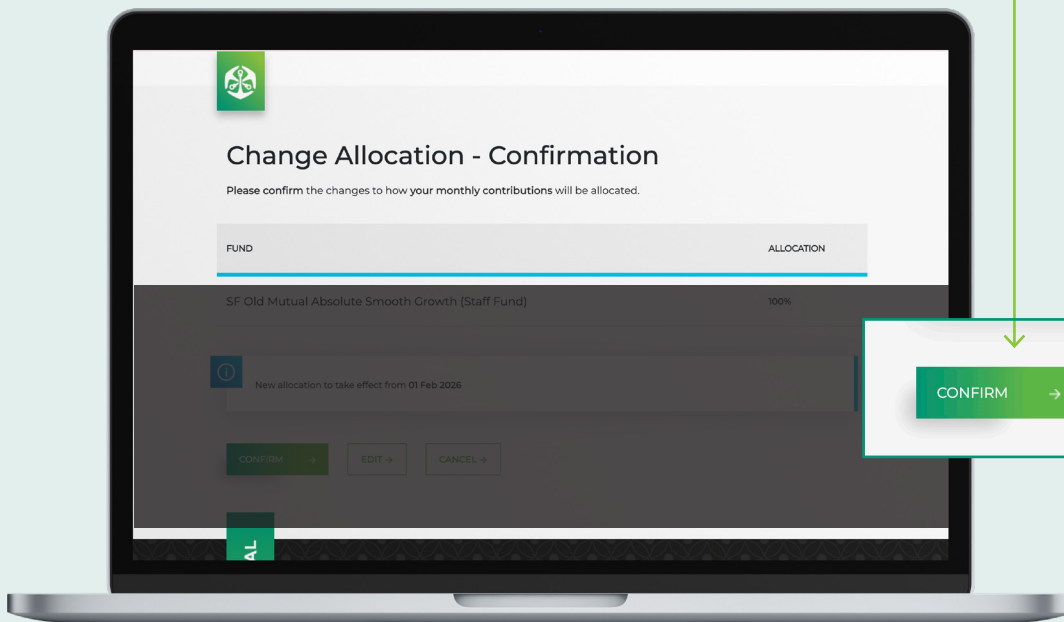


Important notes:

1. The total percentage allocation must equal 100.
2. Do not include the percentage symbol (%).
3. Enter the numbers only (up to two decimal points).

Step 6: Review and Submit

1. Select **Change Allocation**.
2. Review the allocation election details carefully.
3. If all details are correct, select **Change Allocation**.
4. Select **Confirm**.



Step 7: Accept Terms and Conditions

Read the terms and conditions.

1. Tick the acceptance check box.
2. Select **Accept** to complete your request.

Terms & Conditions



Investment Disclaimer

Every effort has been made to include accurate information on this statement, however you need to check it before making any decisions. Please refer to your member benefit statement and the Rules of the Fund for terms and conditions.

Balance amounts are reflected in South African Rand (ZAR). Balance amounts are calculated using the latest available unit prices. Pending transactions and switches will not be taken into account to determine the closing balance. The prices reflected here are as provided by the Investment Managers of the respective investment funds. Old Mutual will update the unit prices daily or, in the case of technical problems, will display the latest available price. A record of all the units purchased in each investment fund that you have selected is maintained. Please note that changes to your investment is binding once transacted

Investments Declaration

I understand that I may only switch investments if my employer has elected a retirement fund investment option that facilitates member investment choice and switching. I waive any claim for any loss that I may sustain as a consequence of my own investment options and indemnify the Fund against any claims by me or my dependants arising from any losses as a consequence of this decision.

I accept the Internet as a legally binding delivery mechanism. The onus is on me to confirm receipt of my request by Old Mutual by calling 0860 203 040, if Old Mutual does not acknowledge receipt of my instruction within five working days. then the change may not have taken place.

I have read, understood and accept the above declaration. Terms & Conditions

ACCEPT →

CANCEL →

WHAT HAPPENS NEXT

- Your investment election will be processed on the first business day of the following month.
- Your future Fund contributions will be invested according to your selected investment portfolio(s).

FREQUENTLY ASKED QUESTIONS

When will my investment election be processed?

Your money will be invested in the new investment portfolio(s) on the first business day of the month following your election, provided that you submit your investment election **before the 20th of the month**.

How often can I make an investment election?

You can change the investment portfolio for your future Fund contributions **once a month**.

Can I cancel an investment election?

Yes. To cancel an investment election:

1. Select **Investment Election** under the **Transacting tab**.
2. Select **Cancel Investment Election**.

Only elections that have not yet been processed can be cancelled.

Where can I view my current Member Account Balance?

You can view your Member Account Balance on the home page of the Old Mutual Portal, on the same page that displays the **Save & Invest** tile.

Will I receive confirmation that my investment election was processed?

Once you have submitted your election, a confirmation message will appear on screen stating that your investment election request has been submitted.

Is there a cost to make an investment election?

No. There is no cost to make an investment election.

NEED HELP?

Contact the Member Service Centre:

- Phone: 0860 20 30 40
- Email: superfund@oldmutual.com

