

Retirement

The outstanding advantages of being part of an Alexforbes Umbrella Fund will truly impress you!



You probably already know that belonging to an umbrella fund has many benefits.

But do you know that belonging to the **fund gives you 7 more reasons** to celebrate being a member?

That's because you can:

1 **Make more informed decisions** with our My Money Matters Toolkit

Get **access** to My Money Matters Toolkit - to help you manage your finances and guide you through starting a new job, resigning and retiring.



Follow these easy steps to register for AF Connect

- 1 Access the My Money Matters Toolkit website [here](#).
- 2 Select Register, complete the required fields and click on the Register button.
- 3 You will be sent a confirmation email or SMS based on the registration.

2

Learn more about your money with AF Connect: your online financial resource

Stay on track to reach your retirement goals with AF Connect.



View your life and disability insurance values



Enjoy real-time access to investment and discretionary savings values



Complete an online nomination of beneficiary form



Access your benefit statement



3 Get more for less with AF Rewards

Alexforbes has partnered with Randgo, a digital shopping mall, to offer members valuable savings and discounts on everyday products and services.

You'll get:



Special deals and discounts



Amazing travel discounts



Food, cleaning products, baby products and more

From Dis-Chem, Shoprite, Checkers, Checkers Hyper and Pick n Pay - it's a big deal and there's no subscription fee!

[Start shopping now](#)

4 AF WhatsApp Channel - Self Service options

Use WhatsApp self-service, which gives you access to:

- > Connect with an Alexforbes financial adviser
- > Benefit statements
- > Latest tax certificate
- > Claims summary and status
- > Register on AF Connect or reset password
- > Learn more on specific topics
- > WhatsApp uses end-to-end encryption to keep your messages secure



5 Feel secure with more affordable cover - especially when tragedy strikes



Pay LESS for excellent group life, disability and critical illness cover - to protect your family.

[Meet the Financial Bunny](#)

6 Be more prepared for the unexpected with our will and estate planning services

Drafting a will and doing estate planning can take care of your nearest and dearest when you pass away. We'll draft you a standard will at no cost and there are no hidden obligations. If your needs are more complex, we'll draft a customised will at a reasonable cost.



Speak to your employer appointed financial adviser or contact an Alexforbes consultant on: 011 269 0000 or email affiduciaryservices@alexforbes.com

7 Save more with our tax-free savings account: easy, flexible, affordable

Save up to R36 000 a year tax free and avoid:



Tax



initial fees



administration fees



performance-based fees



withdrawal penalties

When you invest in a tax-free savings account you don't pay tax on your returns, putting money back in your pocket.



Call us on 0860 66 444 or email investadmin@alexforbes.com.

There you have it, the Alexforbes Umbrella Funds are more than just a retirement fund. Unlock a world of benefits beyond retirement when you join an Alexforbes Umbrella Fund!