

PLEASE TYPE OR WRITE IN BLOCK CAPITALS

KINDLY COMPLETE THE RELEVANT SECTION(S) BELOW TO UPDATE YOUR MEMBER RECORD.

CURRENT PERSONAL INFORMATION (AS STATED ON ACCOUNT)			
Title (Mr. Ms. Mrs. Other)	First Name:	Middle Name(s)	Last Name
Date of Birth (dd/mm/yyyy)		Tax Identification Number (e.g. TRN, SSN, SIN)	

A. UPDATED PERSONAL INFORMATION

If your name is incomplete, spelt incorrectly in our database or has changed, e.g. by marriage/deed poll, please print as it should appear on your client record and provide proof of the change.			
Title (Mr. Ms. Mrs. Other)	First Name	Middle Name(s)	Last Name:
Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Common Law <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed			

B. UPDATED CONTACT INFORMATION

<input type="checkbox"/> Residential OR <input type="checkbox"/> Mailing Address (for residential address changes, proof of address required – no older than 3 months)			
Parish/City:	State:	Zip Code/Sector:	Country:
<input type="checkbox"/> Additional OR <input type="checkbox"/> Replacement Telephone Numbers:			
Home:	Work:	Mobile (1):	Mobile (2):
<input type="checkbox"/> Additional OR <input type="checkbox"/> Replacement Email Address:			
Email (1):		Email (2):	

C. UPDATE MY SALARY & CONTRIBUTION INFORMATION

Select your Fund Strategy & state the % or value of contribution that you are making towards your RS.					
New Fund Strategy	<input type="checkbox"/> Conservative <input type="checkbox"/> Moderate <input type="checkbox"/> Aggressive	New Gross Annual Salary	J\$.....	New Contribution Rate (1-20%) or Fixed Contribution Amount (\$)	%/J\$.....

NOTE: All funds in your existing fund strategy will be switched to your new fund strategy. Switching is permitted once per year. Please provide your current pay slip to update your annual salary.

D. UPDATE FUND STRATEGY

SELECT FUND STRATEGY		SELECT CATEGORY
New Fund Strategy	<input type="checkbox"/> Conservative <input type="checkbox"/> Moderate <input type="checkbox"/> Aggressive	<input type="checkbox"/> Transfer from JMMB RS Corporate (ARSC) to JMMB RS Retail (ARSR) <input type="checkbox"/> Transfer from JMMB RS Retail (ARSR) to JMMB RS Corporate (ARSC) <input type="checkbox"/> Transfer from JMMB RS Corporate (ARSC) to JMMB RS Corporate (ARSC) in the name of _____

E. UPDATE MY BENEFICIARY &/TRUSTEE INFORMATION

BENEFICIARY NAME	RELATION	DOB	%	TRN	ADDRESS	CONTACT NO.
		(dd/mm/yyyy)				
		(dd/mm/yyyy)				

PLEASE NOTE: The allocation total must equal to 100%. The beneficiaries listed above are deemed to be revocable beneficiaries unless otherwise stated. If any of the beneficiaries are under 18 years of age, an adult must be appointed as trustee.

TRUSTEE NAME	TRUSTEE FOR	ADDRESS	TRN	CONTACT NO.

F. CHANGE MY RETIREMENT AGE

My new retirement date is: _____

- Under the JMMB RS, normal retirement age (NRA) is between ages 60 and 65 years for both male and female.
- Early retirement is 10 years before NRA. For example, if you choose to retire at age 60 and opt for early retirement, then your new retirement age is age 50.
- Late retirement is 5 years after NRA. For example, if you choose to retire at age 65 and opt for late retirement, then your new retirement age becomes age 70.

DECLARATION

I confirm that all the above information is true, correct, and complete to the best of my knowledge and authorize JMMB Ltd Retirement Scheme (Administrator) to make these changes on my account.

Member Signature: _____

Date: _____

Witness Name: _____

Date: _____

Witness Signature: _____