

PENSION FUND

Availability of Financial Planner

Mr Gerard Visser, a personal financial planner employed by Alexander Forbes, the administrators of the university's pension funds, will be available on all four campuses, **by appointment only** on the dates and times set out below to assist employees with their personal financial and retirement planning.

Services include:

- Advice and assistance at the time of **resignation, retirement and retrenchment**.
- Advice on investment portfolio choices on your University of Johannesburg Pension Fund.
- Advice on product and investment portfolio options on discretionary (voluntary) funds.
- Estate planning, including the drawing up of a Will and a Trust.
- Introduction to Alexander Forbes Insurance for motor and household insurance.
- Holistic Financial Planning.

Appointments must be made with Mrs Fairuze Morgan on extension 4877 or via email on: fkhan@uj.ac.za. Unfortunately, **no walk-ins** can be accommodated.

The Trustees specifically record that it remains the sole responsibility of a member to seek professional advice and that any advice or communication between an advisor, planner, broker, and member remains a personal matter for the member. Members are advised that Alexander Forbes' personal financial planners earn commission.

Sincerely,

Evette Vanrenen-Linford

PRINCIPAL OFFICER

University of Johannesburg Pension Fund Office

Auckland Park Kingsway Campus

E Ring, Ground floor

011 559 4898

APK		
DATE	TIME	VENUE
Monday 10 Feb	09:00-15:30	Pension fund office E Ring, Ground floor
Monday 9 March	09:00-15:30	
Monday 6 April	09:00-15:30	
Monday 4 May	09:00-15:30	
Monday 1 June	09:00-15:30	
Monday 6 July	09:00-15:30	
Monday 3 August	09:00-15:30	
Tuesday 1 September	09:00-15:30	
Monday 5 October	09:00-15:30	
Monday 2 November	09:00-15:30	
SWC		
DATE	TIME	VENUE
Wednesday 12 Feb	09:00-13:00	Commercial Accounting Boardroom, Robert Sobukwe Building
Wednesday 11 March	09:00-13:00	
Wednesday 8 April	09:00-13:00	
Wednesday 6 May	09:00-13:00	
Wednesday 3 June	09:00-13:00	
Wednesday 8 July	09:00-13:00	
Wednesday 5 August	09:00-13:00	
Thursday 3 Sept	09:00-13:00	
Wednesday 7 October	09:00-13:00	
DFC		
DATE	TIME	VENUE
Monday 17 Feb	09:00-14:00	Room 2206 John Orr Building, Dept of Biotech and Food Tech Boardroom
Monday 16 March	09:00-14:00	
Wednesday 15 April	09:00-14:00	
Monday 11 May	09:00-14:00	
Monday 8 June	09:00-14:00	
Monday 13 July	09:00-14:00	
Tuesday 11 August	09:00-14:00	
Monday 7 September	09:00-14:00	
Monday 12 October	09:00-14:00	
Wednesday 4 Nov	09:00-14:00	

APB		
DATE	TIME	VENUE
Thursday 20 Feb	09:00-13:00	Main Campus Library: Visitor's Office, First floor
Wednesday 18 March	09:00-13:00	
Thursday 16 April	09:00-13:00	
Wednesday 13 May	09:00-13:00	
Wednesday 10 June	09:00-13:00	
Tuesday 21 July	09:00-13:00	
Thursday 13 August	09:00-13:00	
Wednesday 9 Sept	09:00-13:00	
Thursday 15 October	09:00-13:00	