

# Additional Investment Phase-in Unit trusts

**This form will only be accepted when submitted with a completed and signed additional investment form.**

- Phase-ins are processed on the 10th of each month (or first business day thereafter).
- Your investment amount will be invested into the Nedgroup Investments Core Income Fund and phased in monthly over the selected period into the unit trust portfolio(s) indicated below.
- Phasing in will commence during the month indicated on this form provided all requirements are received five business days before the 10th. If not, it will commence during the following month.
- You may not elect to phase into a unit trust portfolio from which a recurring withdrawal has been requested.

## INVESTOR DETAILS

Investor name

Investor number

SA ID number / Passport number / Registration number

Amount to be phased-in R

Please indicate the initial fee to be deducted before investment into Nedgroup Investments Core Income Fund.  % (excl VAT)

Phase in period  3 months  6 months Month of commencement   
M M Y Y Y Y

Please indicate the annual financial planning fee to be deducted from the money held in the Nedgroup Investments Core Income Fund pending phase-in (if applicable).  % (excl VAT)

## UNIT TRUST PORTFOLIO SELECTION

### Phase into an existing unit trust portfolio account

Unit trust portfolio	Account number	Percentage allocation
<b>Total (must equal 100%)</b>		<b>%</b>

**All features of your existing account will apply to the additional investment amount, including annual financial planning fees (if applicable).**

## Phase into a new unit trust portfolio account

Unit trust portfolio	Percentage allocation	Income distribution		Only applicable if investing with a financial planner
		Reinvest	Pay out	Annual FP fee (excl VAT)
		✓	OR	✓
				%
<b>Total (must equal 100%)</b>	<b>%</b>			

### Please note

- If no income distribution instruction is provided your distribution will be set to reinvest. If you select payout as your income distribution option:
  - distribution amounts will be paid electronically into the investor bank account.
  - distribution amounts will not be paid to third party accounts or by cheque.
  - if the payment is rejected, your distribution will be reinvested using the ruling price into the originating unit trust portfolio and your income distribution option will be changed to 'reinvest'.

### FINANCIAL PLANNING FEES

- If no fees have been specified, 0% will apply.
- If a fee higher than the maximum is specified, the maximum will apply.
- Initial fees in respect to debit orders will be deducted off each debit order amount before investing into the selected unit trust portfolio.
- If you have nominated an account from which the annual fee is to be recovered, your selection will apply to your additional investment.

Nedgroup Investments (Pty) Limited (Company registration number 1996/017075/07)  
 Incorporating Nedgroup Collective Investments (RF) Proprietary Limited (Company registration number 1997/001569/07); Nedgroup Investment Advisors Limited (Company registration number 1998/017581/07) an authorised Financial Services Provider (FSP Licence No. 1652) Sponsor of the Nedgroup Investments Retirement Funds

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