

Additional Investment funded by a transfer

Tax-free Investment

1. Receiving product provider

Product provider name	Nedgroup Collective Investments (Pty) Limited		
Registration number	1996/017075/07	SARS reference number	9567186847
Tax free savings account product name	Nedgroup Investments Tax-free Investment		

2. What you need to know

Compliance with the Financial Intelligence Centre Act, 38 of 2001 (FICA) is required to process your instruction - if you have not previously submitted the necessary supporting documentation to us or your authorised financial planner, please do so with this form.

1. Before completing this form please read the latest relevant Investment Agreement and Portfolio Characteristics document which can be obtained from our website: www.nedgroupinvestments.com, your financial planner or our Client Service Centre.
2. Your investment will be invested into the unit trust portfolio class specified on the relevant Portfolio Characteristics document. If you start a debit order on an existing unit trust portfolio, you will remain invested in that class.
3. We will process your instruction once we have received a completed and signed form.
4. The daily cut-off for receipt of instructions is 14:00.
5. Information filled in outside of the relevant fields will not be considered when processing your instruction.
6. Return the completed and signed form with the relevant supporting documents to us via email to nedgroupinvestments@silica.net (please print and sign the form before scanning and emailing it to us, as an authorised signature is required for processing).
7. If you have any questions about this form please contact your financial planner or our Client Service Centre on **0860 123 263** (from within RSA) or on **+27 21 416 6011** (from outside RSA).

3. Tax free investments notes

1. Total contributions are limited to R33 000 per tax year (R500 000 over your lifetime) across all tax-free investments, regardless of product provider, including monthly debit orders.
2. Should your contributions exceed R33 000 per tax year, SARS will tax the over contributions at a flat rate of 40%. Please refer to the latest Investment Agreement for further clarity.
3. You can withdraw from your tax-free investment at any time.
4. Withdrawn amounts that are re-invested will be treated as additional contributions and therefore be subject to your annual contribution threshold of R33 000 as well as your lifetime R500 000 threshold.
5. Income distributions will be reinvested.

4. Investor details

Investor number	<input type="text"/>
Title and surname	<input type="text"/>
First names	<input type="text"/>
SA ID / passport number	<input type="text"/>
Expiry date	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> D D M M Y Y Y Y

5. Income verification

This information is an anti-money laundering requirement prescribed by the Financial Intelligence Centre Act, 38 of 2001 (FICA). Supporting documentation may be requested.

How are you funding this transaction?

Salary
 Sale of property
 Inheritance
 Other (please specify)

Occupation

6. Transferring product provider details

Product provider name

Registration number SARS Ref number

Product name

Product type

Full transfer
 Partial transfer

Contact person at transferring product provider

Contact number + (0)

Email address

7. Investment details

UNIT TRUST PORTFOLIO SELECTION (for existing portfolio)

Only applicable
if investing with
a Financial
Planner

Unit trust portfolio	Account number	Percentage allocation	Initial FP (excl VAT)
		%	%
		Must equal 100%	

Please note

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

Initial 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.

UNIT TRUST PORTFOLIO SELECTION (for new portfolios)

Unit trust portfolio	Percentage allocation	Only applicable if investing with a Financial Planner	
		Initial FP fee (excl VAT)	Annual FP fee (excl VAT)
Equity portfolios	%	%	%
Rainmaker			
Value			
Growth			
Private Wealth Equity			
Specialist equity portfolios			
Entrepreneur			
Mining & Resource			
Financials			
Asset allocation portfolios			
Stable			
Opportunity			
Managed			
Balanced			
Bravata Worldwide Flexible			
Income portfolios			
Core Income			
Flexible Income			
Core Bond			
Property			
Core portfolios			
Core Guarded			
Core Diversified			
Core Accelerated			
International portfolios			
Global Property Feeder			
Global Cautious Feeder			
Global Flexible Feeder			
Global Equity Feeder			
Core Global Feeder			
Additional unit trust portfolios			
Must equal 100%			

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.

Annual fees

- If you have nominated an account from which the fee is to be recovered, your selection will apply to your additional investment.

