

# Authority to transact online



## 1. What you need to know

1. This authorisation will remain in place until you inform us otherwise.
2. Note that information filled in outside of the relevant fields will not be considered when processing your instruction.
3. 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); or
  - Fax to **0861 119 733** (from within RSA) or to **+27 11 263 6067** (from outside RSA).
4. We will process your instruction once we have received a completed and signed form.
5. The daily cut-off for receipt of instructions is 14:00.
6. 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).

## 2. Investor details

Investor number

### Individuals:

Title and surname

First names

SA ID number

Passport number  
(if foreign national)

Expiry date   
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Country of issue

### Legal entities:

Registered name

Trading name

Registration number

### 3. Financial planner details and declarations

This section can only be completed by the financial planner that we have on record for you.

Name of financial planning business

Name of financial planner  Code

Contact number +  (0)

- I confirm that I am appropriately authorised and licensed under the Financial Advisory and Intermediary Services Act, 37 of 2002 (FAIS) and with the Financial Services Board (FSB) to submit instructions on my client's behalf.
- I acknowledge and agree that I will only act on my client's written instruction, and keep a record of each signed instruction, when transacting on the secure website.
- I have read, understood and agree to the secure website user terms and conditions, applicable to submitting instructions via the secure website.
- I acknowledge and agree that Nedgroup Investments will not be held liable for acting on, or failing to act on, any instructions submitted by me via the secure website and I indemnify and hold Nedgroup Investments harmless from all direct or indirect claims (including claims for consequential damages) in this regard.
- I understand that Nedgroup Investments reserves the right, at any time, to review my license and/or to audit or request copies of my client's consent (whichever applicable) for instructions that I have submitted via the secure website.
- I confirm that I explained to my client and that my client accepts Nedgroup Investments latest relevant Investment Agreement, Portfolio Characteristics Document and relevant fund fact sheet as applicable to each instruction/transaction received from my client.

Signature of financial planner

Date   
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### 4. Account authorisation

Your financial planner indicated above will be able to submit instructions on your unit trust portfolio(s) denoted by the above-mentioned investor number (including but not limited to: additional investments; additional unit trust portfolios; switches; ad hoc and recurring withdrawals; monthly debit orders).

**Please note**

- Any instructions from your financial planner which require any changes to the bank account details Nedgroup Investments have on record for your investments will not be permitted.

## 5. Investor declaration

- I authorise Nedgroup Investments to act on instructions received from this financial planner via the secure website.
- I confirm that all information provided in this form, whether in my hand writing or not, is true and correct.
- Where I am acting as a representative on behalf of a legal entity, I confirm that I am duly authorised to complete and sign this form.
- I understand and agree that all instructions submitted by my financial planner will be governed by the latest relevant Investment Agreement, Portfolio Characteristics document and relevant fund fact sheet in force as at the date each instruction is submitted.
- I acknowledge and agree that Nedgroup Investments will not be held liable for acting on, any instructions submitted by the financial planner via the secure website and I indemnify and hold Nedgroup Investments harmless from all direct or indirect claims (including claims for consequential damages) in this regard.

Investor / Authorised signatory

Date          
D D M M Y Y Y Y

Name

Capacity

Authorised signatory

Date          
D D M M Y Y Y Y

Name

Capacity

Authorised signatory

Date          
D D M M Y Y Y Y

Name

Capacity

Authorised signatory

Date          
D D M M Y Y Y Y

Name

Capacity

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

Nedbank Clocktower Precinct V&A Waterfront Cape Town 8001

PO Box 1510 Cape Town 8000 South Africa

[www.nedgroupinvestments.co.za](http://www.nedgroupinvestments.co.za)

Directors: I Ruggiero NA Andrew CE Sevenoaks