

- Use this form to make an additional contribution to your investment.
- Send the completed form to instructions@psg.co.za.
- If you need assistance, please contact your financial adviser or one of our client service consultants on 0860 774 774 or at clientservice@psg.co.za.

INVESTOR DETAILS

Name and surname/Name of company or trust

ID/Passport number/Registration number

Investment number

ADDITIONAL CONTRIBUTION DETAILS

How much would you like to invest? R

WHERE DOES THE MONEY COME FROM?

We are required by law to ask where the money comes from, and in some cases to verify the source of the investment. Please tick the appropriate blocks for your lump-sum contribution.

Business income/profits	<input type="checkbox"/>
Credit	<input type="checkbox"/>
Donations/Gifts/Inheritance/Winnings	<input type="checkbox"/>
E-gambling	<input type="checkbox"/>
Passive income (rental, dividends, interest)	<input type="checkbox"/>
Pension interest in a divorce order	<input type="checkbox"/>
Property sale	<input type="checkbox"/>
Retirement annuity fund/Insurance/Tax payout	<input type="checkbox"/>
Salary/Bonus	<input type="checkbox"/>
Savings	<input type="checkbox"/>
Transfer	<input type="checkbox"/>
Other (please specify) <input type="text"/>	<input type="checkbox"/>

Select the funds in which you would like to invest from the list of available funds [on our website](#), you can select a maximum of 10 funds to invest in.

The first table below must include the source fund (if you want to phase in your funds on the lump sum investment) and must exclude the destination funds for phase-in. The second table must be used to indicate the source fund for your phase-in transaction, and the third table must indicate the destination fund(s) for the phase-in transaction. For the source fund, you have the option to use either the PSG Money Market Fund (F) or the PSG Wealth Enhanced Interest Fund (D). The latter is only available to clients of PSG Wealth Financial Planning advisers.

Please indicate your fund class clearly. If you do not indicate your fund class, we will default to the clean fee class of the particular fund:

Fund name(s) for Lump-Sum Investment	Fund class	Percentage	
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
	Total	100	%

PHASE-IN

You may only select one of the below source funds to phase in from. The PSG Wealth Enhanced Interest Fund (D) is only available to clients of PSG Wealth Financial Planning advisers.

Source fund for phase-in instruction (must also be listed in table above)	Fund class	Percentage	
PSG Money Market Fund	F		%
PSG Wealth Enhanced Interest Fund	D		%

Destination fund(s) for phase-in instruction	Fund class	Percentage	
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
	Total	100	%

Phase-in commencement date

Phase in weekly Number of phase-in transactions (select number of transactions from 1 to 52).

or

Phase in monthly Number of phase-in transactions (select number of transactions from 1 to 12).

HOW WOULD YOU LIKE TO PAY?

How would you like to pay your lump-sum contribution?

Electronic fund transfer Electronic collection by PSG (direct debit)

Collection date if collected by PSG

(if not completed, collection will be done immediately, subject to cut-off times)

Are you transferring your investment from another financial services provider?

Yes No

If 'Yes', you must complete the ['Transfer of units in form'](#).

An additional contribution can be paid by the investor or by someone other than the investor. Which bank account should we use for the direct debit?

Account holder

Account number

Bank name Branch code

Cheque/Current Savings

Use this bank account for all my future recurring contributions.

If these bank details change, let us know by completing the ['Personal detail changes form'](#).

If a third party is contributing to your investment, we need their details and FICA documents.

Name and surname of account holder

ID/passport number of account holder

Physical address of account holder

THIRD PARTY AUTHORISATION

I authorise PSG to draw the debit order amount from the South African bank account I have provided.

Account holder signature

Date

- Cut-off time for transactional requests is **10h30** for that day. For Money Market Funds, the cut-off time is **08h30** for that day. Instructions received after cut-off will be processed on the following business day.
- The maximum once-off amount we may collect is R1 million per day. If you would like us to collect a larger amount from your account, please consider using an electronic fund transfer (EFT). The limit for an EFT is R5 million per day.
- Withdrawals will only be allowed after the clearance period (21 business days for direct deposits and 45 business days for debit orders).

Please submit the following FICA documents with your instruction:

- A copy of the third party's ID (or passport if he or she is not a South African citizen)
- Proof of third party's address (less than three months old)
- A letter from the bank confirming the third party's bank details (less than three months old)

[Visit our website](#) for the list of FICA documents required from minors.

YOUR LIVING ANNUITY INCOME WILL CHANGE

When you selected your annuity income amount, PSG Wealth calculated that amount as a percentage of your total investment. This means that when you make an additional contribution, your income amount will increase, because the percentage value of your annuity income remains the same.

You can change the amount and the frequency of your annuity income annually on the anniversary of your investment. We will send you a reminder three months before the anniversary of your investment.

You can change the funds from which you would like to withdraw your income. Your selection will replace any previous selections you have made.

From which of the funds you have invested in would you like to withdraw your income?

CONTACT DETAILS

Physical Address: Building 1, The Ingress, Corner of Magwa and Lone Creek Crescents, Waterfall City, Waterfall, 2090, Gauteng, South Africa

Postal Address: PO Box 61295, Marshalltown, 2107, South Africa

Sharecall: 0860 774 774

Email: clientservice@psg.co.za

Website: www.psg.co.za