

- Use this form to change beneficiaries on your PSG Wealth Retirement Annuity Fund, PSG Wealth Preservation Pension Fund, PSG Wealth Preservation Provident Fund, PSG Wealth Equity Linked Living Annuity or PSG Wealth Endowment.
- Only individuals may complete this form. Entities cannot nominate beneficiaries.
- This form will replace all previous beneficiary nominations that we have on record.
- We must receive this form while you are still alive. PSG cannot process a change of beneficiaries after your death.
- Send the completed form to [instructions@psg.co.za](mailto:instructions@psg.co.za).
- If you need assistance, please contact your financial adviser or one of our consultants on 0860 774 774 or [clientservice@psg.co.za](mailto:clientservice@psg.co.za).

## INVESTOR DETAILS

Name and surname

ID/Passport number

Investment number

## NOMINATE YOUR BENEFICIARIES

### BENEFICIARIES OF YOUR PSG WEALTH RETIREMENT ANNUITY FUND, PSG WEALTH PRESERVATION PENSION FUND OR PSG WEALTH PRESERVATION PROVIDENT FUND

The trustees of the funds will identify all your dependents (whether you nominated them as beneficiaries or not) and ensure that your beneficiaries are paid fairly. Your nomination will help the trustees to perform their duties, but your nominations may not be honoured.

Please list **all** of the beneficiaries you would like to nominate to receive the proceeds of your investment when you pass away. The nominations you make here will replace all previous nominations, so if you have previously nominated beneficiaries that you want to keep as beneficiaries, please list them here too.

Beneficiaries							
Title	Initials	Surname	Relationship to you	Dependent (Yes/No)	Date of birth	% benefit	
							%
							%
							%
							%
							%
						100	%

Other dependants. Please list any other persons you believe are dependent on you.							
Title	Initials	Surname	Relationship to you	Dependent (Yes/No)	Date of birth	% benefit	
							%
							%
							%
							%
							%
						100	%

## BENEFICIARIES OF YOUR PSG WEALTH ENDOWMENT OR PSG WEALTH EQUITY LINKED LIVING ANNUITY

Please list **all** of the beneficiaries you would like to nominate to receive the proceeds of your investment when you pass away. The nomination you make here will replace all previous nominations, so if you have previously nominated beneficiaries that you want to keep as beneficiaries, please list them here too.

Primary beneficiaries						
Title	Initials	Surname	Relationship to you	Date of birth	% benefit	
						%
						%
						%
						%
						%
					100	%

If there are no surviving primary beneficiaries when you pass away, the proceeds will be paid to your alternative beneficiary or beneficiaries.

Alternative beneficiaries						
Title	Initials	Surname	Relationship to you	Date of birth	% benefit	
						%
						%
						%
						%
						%
					100	%

## SPOUSE CONSENT

This section only applies if you are nominating beneficiaries for a PSG Wealth Endowment.

Are you married in community of property?  Yes  No

If you are married in community of property you require your spouse's written consent to nominate another beneficiary.

To be completed by the investor's spouse:

Spouse name and surname

I consent to the nomination of the beneficiaries in this form.

Spouse signature  Date

## SIGNATURES

By signing this form, I confirm that:

- I have given PSG accurate information.
- I understand that PSG Invest, as the administrator of this investment is not authorised to provide any financial advice.
- My appointed financial adviser will have access to my investment details.
- I have read and accept the terms and conditions of my investment.

## INVESTOR

Investor signature  Date

If you are signing on behalf of the investor, please provide your details below.

Name  Surname

ID number  Designation

Signature

## CONTACT DETAILS

**Physical Address:** 1st Floor, Roland Garros, The Campus, 57 Sloane Street, Bryanston, 2191

**Postal Address:** PO Box 61295, Marshalltown, 2107

**Sharecall:** 0860 774 774

**Email:** [clientservice@psg.co.za](mailto:clientservice@psg.co.za)

**Website:** [www.psg.co.za](http://www.psg.co.za)