

- Use this form to change your personal, tax or banking details. If you leave a field blank, we will assume that it has not changed.
- 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 client service consultants on 0860 774 774 or at [clientservice@psg.co.za](mailto:clientservice@psg.co.za).

## EXISTING INVESTOR DETAILS

Name and surname/Name of company or trust

ID/Passport number/Registration number

Investment number

## CHANGES TO PERSONAL DETAILS

### INDIVIDUAL DETAILS

First names

Surname

ID/Passport number

← If your name, ID or physical address has changed, please submit the relevant FICA documents. [Visit our website](#) for the list of FICA documents required for individuals.

### ENTITY DETAILS

Entity name

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

### YOUR OCCUPATION OR BUSINESS (INDIVIDUAL AND ENTITY DETAILS)

What is your occupation?

Clerical support

General staff

Management

Religious leader

Executive

Unemployed

Head of government/cabinet minister/judge

Professional

Self-employed

Traditional leader/royal family

Other

← Our risk-based approach to money laundering means we must record your occupation.

What industry do you work in?

Administrative and support service

Agriculture, forestry and fishing

Arts, entertainment and hospitality

Construction

Electricity, water, gas supply and waste management

Financial, investment and insurance

Gambling

Government, state-owned enterprise, armed forces

Human health and social work activities

Information, technology and communication

← Our risk-based approach to money laundering means we must record the industry in which you work. Different industries have different exposures to money laundering risk, and we need to determine whether you operate in an industry that is subject to anti-money laundering measures.

Manufacturing, wholesale or retail	Professional, scientific, technical and education
Mining and quarrying	Real estate
Motor vehicles, transportation, distribution	Unemployed
Non-profit/religious organisation	Other
Politics	

PIPs and PPOs are or were local prominent influential people or foreign prominent public officials. If the investor is a family member, close associate, or a prominent member of the same political party, organisation or union as a PIP or PPO, the investor is also considered to be a PIP or PPO. This includes heads of state, cabinet ministers, government officials, influential officials and political and military leaders.

Are you a Prominent Influential Person (PIP) or Prominent Public Official (PPO)?

Yes No

CONTACT DETAILS

Cell phone Work number

Email address

Physical address: Unit and street

Suburb Code

Town/City Province

Country

Postal address if it differs from your physical address:

Postal address: PO Box

Suburb Code

Town/City Province

Country

**CHANGES TO TAX DETAILS**

Are you a registered taxpayer in South Africa? Yes No

Please submit a copy of a SARS document that confirms your tax number.

South African income tax number

Are you exempt from Dividend Withholding Tax (DWT), or do you qualify for a reduced withholding tax rate?

Yes No

Are you exempt from Withholding Tax on Interest (WTI), or do you qualify for a reduced withholding tax rate?

Yes No

If your answer to either question was 'Yes', please complete the dividends tax declaration available on [www.psg.co.za](http://www.psg.co.za). The default rate will be applied if you do not complete the declaration.

## CHANGES TO BANKING DETAILS

You may provide details for more than one bank account.

If you are providing new bank details here, we need proof of banking details not older than three months.

	Investor account A	Investor account B	Third party account
Account holder			
Bank name			
Account number			
Branch code			
Account type	<input type="checkbox"/> Cheque/Current	<input type="checkbox"/> Cheque/Current	<input type="checkbox"/> Cheque/Current
	<input type="checkbox"/> Savings	<input type="checkbox"/> Savings	<input type="checkbox"/> Savings

Which account should we use for which transaction?

	Investor account A	Investor account B	Third party account
Recurring contribution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recurring withdrawal	<input type="checkbox"/>	<input type="checkbox"/>	

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

## 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.
- If I am also responsible for payments to this investment, I agree that for this investment you can collect money from my bank account(s), and that I can sign for the bank account(s).

## INVESTOR

Investor signature

Date

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

Name

Surname

ID/passport number

Designation

Signature

## FINANCIAL ADVISER

Adviser signature

## 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](mailto:clientservice@psg.co.za)

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