

# RECURRING CONTRIBUTION AND RECURRING WITHDRAWAL CHANGES FORM

- Use this form to make changes to your recurring contributions to or withdrawals from your investment.
- 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).

## INVESTOR DETAILS

Name and surname/Name of company or trust

ID/Passport number/Registration number

Investment number

## RECURRING CONTRIBUTION DETAILS

Would you like to cancel your existing debit order?      Yes      No

How much would you like to invest by debit order? R

Debit order start date

How often?      Monthly      Quarterly      Twice a year      Once a year

## 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, recurring contribution, or both.

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="checkbox"/>

If you would like to escalate annually:  % escalation

Please select the funds in which you would like to invest from the list of available funds on our website at [www.psg.co.za](http://www.psg.co.za).

Please indicate your selected fund(s):

Keep the existing fund allocation for my recurring contribution, or

Allocate funds as indicated in the table below:

Fund name	Fund class	Percentage
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
	Total	100 %

**WOULD YOU LIKE TO CHANGE YOUR RECURRING WITHDRAWAL?**

Would you like to cancel your recurring withdrawal?      Yes      No

How much would you like to withdraw? R

How often?      Monthly      Quarterly      Twice a year      Once a year

If you would like to escalate annually:  % escalation

Income payment date

← Withdrawals will only be allowed after the clearance period (21 days for direct deposits and 45 days for debit orders).

We will pay you as close as possible to this date, but we cannot guarantee payments on specific dates.

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

Fund name	Fund class	Percentage
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
	Total	100 %

## HOW WOULD YOU LIKE TO PAY?

### BANK DETAILS

You may provide details for more than one bank account.

	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

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)

### THIRD PARTY AUTHORISATION

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

Account holder  Date

Signature

## WOULD YOU LIKE TO CHANGE YOUR PREFERRED FEE FUND?

You may choose to have your ongoing investment administration fee and financial adviser fee deducted from a specific fund instead of proportionately from each fund. This is known as your preferred fee fund.

Do you want to change your preferred fee fund?      Yes      No (If you do not want to change it, leave this section blank.)

Fund name	Fund class

## 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)