

- Use this form to notify us that you wish to retire from the Fund.
- 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

ID/Passport number

Investment number

RETIREMENT DETAILS

Date of retirement

Are you retiring early due to ill-health or disability Yes No

The trustees will request medical and other evidence that you must provide at your own cost. The process is governed by the Fund Rules.

DETERMINE YOUR LUMP-SUM BENEFIT

How much would you like to take as a lump-sum? R

or % of my investment value

At retirement you can:

- take a maximum of one-third of the benefit as a lump-sum. You must use the remaining two-thirds to purchase an annuity in your name
- take the full benefit as a lump-sum if the pre-tax value of your benefit, on the date of retirement, is equal to or less than R247 500 (or any other amount determined by legislation), or
- if you are a member of a preservation provident fund you may take 100% of your benefit as a lump-sum.

The lump-sum benefit will only be paid into the member's South African bank account:

Account holder

Bank name Branch code

Account number Cheque/Current Savings

If you are providing new bank details here, we need proof of bank details less than three months old.

INVEST IN A LIVING ANNUITY

If you are withdrawing from the PSG Wealth Retirement Annuity or the PSG Wealth Preservation Pension Fund, you must use the balance of the benefit that remains after the lump-sum is deducted to purchase an annuity with PSG Life or another registered long-term insurer.

Where would you like to invest the balance of your benefit?

- PSG Wealth Equity Linked Living Annuity (please complete and attach a copy of the PSG Wealth Equity Linked Living Annuity application form)
- The Trustees' proposed default annuity (please provide application form)
- Another financial services provider (FSP) (please provide application form and complete the section below)

For more information on the trustees' proposed default annuity, contact our benefits counselling team at wealth@psg.co.za or 0860 000 368. PSG Wealth will charge a once-off administration fee of R1 500.00 to implement the default annuity.

If you are investing with another FSP, please complete the remainder of this section.

Name of the living annuity	<input type="text"/>
Name of the financial services provider	<input type="text"/>
Life licence number	<input type="text"/>
Name of contact person	<input type="text"/>
Email address	<input type="text"/>
Cell phone	<input type="text"/>
Telephone number	<input type="text"/>

FSP BANKING DETAILS

Account holder	<input type="text"/>		
Bank name	<input type="text"/>	Branch code	<input type="text"/>
Account number	<input type="text"/>	<input type="checkbox"/> Cheque/Current	<input type="checkbox"/> Savings

TAX DETAILS

Do you want us to apply for a tax simulation? Yes No

- When you withdraw from your investment, tax will become payable at the rate determined in accordance with the Income Tax Act. Before making a payment, we are legally required to obtain a tax directive from the South African Revenue Services (SARS) for the amount of tax which must be withheld before you are paid.
- Once a tax directive is issued, it is final. However, you can instruct us to request a simulation of the tax directive before we submit it.
- If you request a tax simulation, your withdrawal instruction will only be processed once you accept it.
- Requesting a tax simulation will add two business days to the time it will take us to process your withdrawal.
- Note that the simulation tax directive is not a final directive and tax amounts shown on the simulation may differ from those shown on the final directive from SARS.

SA income tax number	<input type="text"/>
Current annual salary	<input type="text"/>
Number of months employed outside South Africa	<input type="text"/>

If you are you invested in the Government Employees Pension Fund or another public sector fund you must complete the following section:

Pensionable service start date	<input type="text"/>
Number of completed years of membership before 1 March 1998	<input type="text"/>
Total number of completed years membership	<input type="text"/>

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/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

Website: www.psg.co.za