

- Use this form to switch between funds or if you want to rebalance your entire 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

SWITCH OR REBALANCE INSTRUCTION

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

Your selection in the table below will replace the current fund allocation in your investment. ←

- Rebalance my entire investment to the destination funds indicated in the 'Destination fund' column below.
- Switch the funds listed in the 'Current fund' column to those listed in the 'Destination fund' column in the table below.

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.

Current fund	Fund class	Percentage	Destination fund	Fund class	Percentage
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
				Total	100 %

CHANGE YOUR EXISTING RECURRING CONTRIBUTION FUND ALLOCATION

Do you want to change your recurring contribution fund allocation? Yes No

If 'yes', please indicate how your recurring contribution must be invested:

- Same fund allocation as 'Destination funds' or
- Invest according to the funds and percentages in the table below:

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

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