

Transfer of Units in form

- Use this form to transfer units from an investment with another financial services provider to your PSG Wealth investment(s).
- You can only transfer your units if the funds and classes you are transferring are offered by PSG Wealth.
- PSG Wealth cannot cancel existing debit orders with your current financial services provider. It is your responsibility to do this.
- 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.
- If transferring funds from a Retirement Fund where vested and non-vested benefits apply, please use a form per contract for each of these benefits.

Investor details

Name and surname/Name of company or trust

ID/Passport/Registration number

Investment number

Where are you transferring units from?

Name of financial services provider you want to transfer units from

Fund name	Investment number	Fund class	Percentage
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%

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.
- I authorise PSG Wealth to receive and administer the units.
- I confirm that the units are not subject to a cession, pledge or any other transfer.
- I understand that units will only reflect on my statement once the transfer is complete.



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 Date

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