

- Use this form to withdraw funds from your Voluntary Investment Plan or Tax Free Investment plan, or if you want to make an early withdrawal from your Retirement Annuity, Preservation Pension Fund, Preservation Provident Fund, or Equity Linked Living Annuity.
- This form cannot be used to make withdrawals from an Endowment. If you want to withdraw from an Endowment, please complete the Investment Surrender Maturity Application.
- 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

WHAT KIND OF WITHDRAWAL IS THIS?

I want to make a withdrawal from my **Voluntary Investment Plan** or my **Tax Free Investment Plan**.

I want to make a once-off withdrawal from my **Preservation Provident Fund** or **Preservation Pension Fund** before retirement.

I am emigrating (or have emigrated) and want to make a full withdrawal from my **Retirement Annuity Fund, Preservation Provident Fund, or Preservation Pension Fund**.

I want to make a full withdrawal from my **Retirement Annuity** because my benefit amount is less than R7 000.

I want to make a full withdrawal from my **Equity Linked Living Annuity**, because the value is less than R75 000 (if no cash amount was taken on retirement) or less than R50 000 (if a cash amount was taken on retirement).

I want to withdraw a **pension interest in a divorce order** (Please provide a copy of the divorce order stamped by the Registrar of the Court and request that the spouse who is not a member complete the 'Withdrawing a pension interest in a divorce order' section below).

WITHDRAWAL INSTRUCTION

Would you like to withdraw your entire investment?

Yes No

Would you like to cancel any existing recurring transactions (if applicable)?

Cancel my recurring contribution

Cancel my recurring withdrawal

If you are only withdrawing a portion of your investment, please indicate the amount you want to withdraw R

- Instructions to withdraw more than 95% (but less than 100%) of your total investment from any one fund will not be processed. You must either withdraw the entire investment or withdraw less than 95%.
- If the amount you want to withdraw is 90% or more of the value of your investment, we will deduct your ongoing administration fees from the withdrawal amount before payment is made.

Total number of completed years membership

HAS YOUR INVESTMENT BEEN CEDED AS SECURITY?

Has your investment been ceded as security? Yes No

If yes, please include a copy of the original agreement and a letter from the person or company to whom the investment has been ceded, consenting to the withdrawal.

WITHDRAWING A PENSION INTEREST IN A DIVORCE ORDER

If you are withdrawing a pension interest in terms of a divorce order you must complete this section and provide a copy of the divorce order stamped by the Registrar of the Court.

This section must be completed by the spouse who is not the member:

First names

Surname

ID/passport number

South African income tax number

Physical address: Unit and street

Suburb

Code

Town/City

Province

Country

Are you withdrawing cash? Yes No

If yes, please provide banking details for the account to which the payment must be made.

Account holder

Bank name

Branch code

Account number

Cheque/Current

Savings

Are you transferring the pension interest to a retirement annuity, preservation pension fund, preservation provident fund, or equity linked living annuity? Yes No

If yes, please provide a copy of the relevant application form.

Are you transferring the pension interest to another financial services provider (FSP)

Yes No

If yes, please provide a copy of the application form and complete this section.

Name of the product

Name of the financial services provider

FSP registration number

Name of contact person

Please submit the following FICA documents with your instruction:

- A copy of your ID or your passport (if you are not South African)
- Proof of address (less than three months old)
- A copy of a SARS document that confirms your tax number
- A letter from the bank confirming your bank details (less than three months old)

Please ensure that you obtain advice from a tax professional before deciding which withdrawal option to select.

Pension interest in a retirement fund is given specific meaning in our legislation as it represents the portion of the investment that the non-member spouse will be entitled to. The divorce order indicates the specific amount or percentage of the pension interest that must be assigned to the spouse who is not the member. PSG Wealth will only act on valid divorce orders that meet the requirements of the Divorce Act and the Pension Funds Act.

Email address

Cell phone

Telephone number

FSP BANKING DETAILS

Account holder

Bank name

Branch code

Account number

Cheque/Current

Savings

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

Signature of spouse who is
not the member (if applicable)

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