

Additional Investment Phase-in Endowment



This form will only be accepted when submitted with a completed and signed additional investment form.

- Phase-ins are processed on the 10th of each month (or first business day thereafter).
- Your investment amount will be invested into the Nedgroup Investments Core Income Fund and phased in monthly over the selected period into the unit trust portfolio(s) indicated below.
- Phasing in will commence during the month indicated on this form provided all requirements are received five business days before the 10th. If not, it will commence during the following month.
- Monthly income distributions will be reinvested (after tax if applicable).

INVESTOR DETAILS

Investor name

Investor number

SA ID number / Passport number / Registration number

Please indicate the account group(s) into which this phase-in is to be processed

Account group number	Amount to be phased-in
Total (R)	

Please note

- The total additional investment amount cannot exceed an increase of 120% of the highest total contribution to any account group in any one of the previous two policy years.
- Each amount will be invested proportionately into the unit trust specified below.

Please indicate the initial fee to be deducted before investment into Nedgroup Investments Core Income Fund. % (excl VAT)

Phase in period 3 months 6 months Month of commencement
M M Y Y Y Y

Please indicate the annual financial planning fee to be deducted from the money held in the Nedgroup Investments Core Income Fund pending phase-in (if applicable). % (excl VAT)

UNIT TRUST PORTFOLIO SELECTION

Unit trust portfolio	Existing	New	Percentage allocation	Only applicable if investing with a financial planner
				Annual FP fee (excl VAT)
	✓	OR	✓	%
Total (must equal 100%)			%	

Please note

- All features of your existing account will remain unchanged, including annual financial planning fees (if applicable).

FINANCIAL PLANNING FEES

- If no fees have been specified, 0% will apply.
- If you have selected a unit trust portfolio account from which fees are to deducted on your initial investment form, your selection will apply to this instruction.

Nedgroup Investments (Pty) Limited (Company registration number 1996/017075/07)

Incorporating Nedgroup Collective Investments (RF) Proprietary Limited (Company registration number 1997/001569/07); Nedgroup Investment Advisors Limited (Company registration number 1998/017581/07) an authorised Financial Services Provider (FSP Licence No. 1652) Sponsor of the Nedgroup Investments Retirement Funds

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