

Additional Investment Phase-in

Nedgroup Investments Retirement Annuity Fund

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 of receipt of 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.

INVESTOR DETAILS

Investor name

Investor number

SA ID number / Passport number / Registration number

Amount to be phased-in R

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

Phase into an existing unit trust portfolio account

Unit trust portfolio	Account number	Percentage allocation
Total (must equal 100%)		%

All features of your existing account will apply to the additional investment amount, including annual financial planning fees (if applicable).

Phase into a new unit trust portfolio account

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

FINANCIAL PLANNING FEES

- If no fees have been specified, 0% will apply.
- If a fee is higher the maximum is specified, the maximum will apply
- Initial fees in respect to debit orders will be deducted off each debit order amount before investing into the selected unit trust portfolio.
- If you have nominated an account from which the annual fee is to be recovered, your selection will apply to your additional investment.

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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