

# Additional Investment Phase-in Unit trusts

**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.
- You may not elect to phase into a unit trust portfolio from which a recurring withdrawal has been requested.

## 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   
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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
<b>Total (must equal 100%)</b>		<b>%</b>

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

