

# Change your existing debit order

## Tax-free investment

### 1. What you need to know

1. Before completing this form please read the latest relevant Investment Agreement and Portfolio Characteristics document which can be obtained from our website: [www.nedgroupinvestments.com](http://www.nedgroupinvestments.com), your financial planner or our Client Service Centre. To understand the charges that may be incurred when investing, please use the Effective Annual Cost calculator also available from our website.
2. Your investment will be invested into the unit trust portfolio class specified on the relevant Portfolio Characteristics document. If you start a debit order on an existing unit trust portfolio, you will remain invested in that class.
3. We will process your instruction once:
  - we have received, reviewed and accepted your completed and signed form and support documentation; and
  - we have performed all checks, verifications and assessments required in terms of FICA.
4. The daily cut-off for receipt of instructions is 14:00.
5. Information filled in outside of the relevant fields will not be considered when processing your instruction.
6. Return the completed and signed form with the relevant supporting documents to us via email to [nedgroupinvestments@silica.net](mailto:nedgroupinvestments@silica.net) (please print and sign the form before scanning and emailing it to us, as an authorised signature is required for processing).
7. If you have any questions about this form please contact your financial planner or our Client Service Centre on **0860 123 263** (from within RSA) or on **+27 21 416 6011** (from outside RSA).

### 2. Tax-free investments notes

1. Total contributions are limited to R33 000 per tax year (R500 000 over your lifetime) across all tax-free investments, regardless of product provider, including monthly debit orders.
2. Should your contributions exceed R33 000 per tax year, SARS will tax the over contributions at a flat rate of 40%. Please refer to the latest Investment Agreement for further clarity.
3. You can withdraw from your tax-free investment at any time.
4. Withdrawn amounts that are re-invested will be treated as additional contributions and therefore be subject to your annual contribution threshold of R33 000 as well as your lifetime R500 000 threshold.
5. Income distributions will be reinvested.

### 3. Investor details

Investor number

#### INVESTOR TYPE

South African individual

Title and surname

First names

Preferred name

Date of birth          
D D M M Y Y Y Y

SA ID / passport number

Passport expiry date          
D D M M Y Y Y Y

**WHAT IS YOUR SOURCE OF WEALTH?**

- Salary / Commission
- Business earnings
- Pension / Annuity
- Inheritance / Donations / Trust
- Court order / Maintenance
- Self-employed

**WHAT IS YOUR OCCUPATION?**

- Government employee / Judge
- Executive
- Administration
- Arts, performance and hospitality
- Self-employed
- Unemployed
- Professional, scientific and technical services
- Academic
- Sales and marketing
- Craft, trade or artisan
- Religious leader
- Management
- Technical and sciences
- Safety and security personnel
- Sport professional
- Retired

**Other:**

**WHAT INDUSTRY DO YOU WORK IN?**

- Financial, investment and insurance activities
- Information, technology and communication
- Accommodation and hospitality services
- Wholesale and retail trade
- Arts, entertainment and recreation
- Craft, trade or artisan
- Manufacturing
- Construction
- Non-profit / religious
- Government, Municipal services or SOE
- Unemployed
- Professional, scientific and technical services
- Administrative and support services
- Human health, social work and education
- Transportation and storage
- Real estate
- Sport professional
- Mining
- Agriculture, forestry and fishing
- Gambling
- Public administration, defence and social security

## 4. Investment details

### INTENDED PURPOSE OF INVESTMENT

- Invest for 0 – 3 years
  Invest for 3 - 5 years
  Invest for over 5 years

### NATURE OF RELATIONSHIP WITH NEDGROUP INVESTMENTS

- Invest multiple amounts with occasional withdrawals

### HOW ARE YOU FUNDING THIS TRANSACTION?

- Salary / Commission
  Investments / Rental income
  Sale of assets
  Pension / Annuity  
 Court order / Maintenance
  Inheritance / Donations / Winnings
  Self-employed
  Business earnings

### DEBT ORDER CHANGE DETAILS

**Please note:**

- For your debit order to come into effect on the selected date, your debit order instruction must reach us no later than five business days before the selected date. If all requirements are not met, your debit order instruction will be processed on the selected date in the following month.
- Debit orders take 45 days to clear.

### CHANGE AN EXISTING DEBIT ORDER

Unit trust portfolio	Account number	Cancel	Increase	Decrease	New debit order amount	Effective month
		✓ OR	✓ OR	✓		
<b>Total (R) - Total contributions are limited to R33 000 per tax year</b>						

## 5. Investor bank account details

**Please note**

- Payments will be delayed if the name of the account holder as registered with the bank is different from that completed below.
- If the bank account specified below is new, you will be required to authorise this instruction by responding to an SMS that Nedgroup Investments will send you.

Name of account holder (as registered with bank)

Name of bank

Account number

Name of branch  Branch code

Account type  Current  Savings Country

## 6. Financial planner details and declaration

Name of financial planning business

Name of financial planner  Code

Contact number +  (0)

I confirm that:

- I have made the disclosures required in terms of the Financial Advisory and Intermediary Services Act, 37 of 2002 (FAIS) to the investor.
- I have explained all fees that relate to this investment to the investor.
- I am authorised by the financial planning business to sell this investment / product in terms of FAIS.

Financial planner signature

Date   
D D M M Y Y Y Y

## 7. Investor declaration

I confirm and certify that:

- I am responsible for my investment decisions and have considered whether this investment is right for my needs.
- I confirm that all information provided in this application is true and correct and that I am not aware of any other information that may affect this application negatively.
- Where I am acting on behalf of another person, or as a representative of a legal entity, I confirm that I am duly authorised to complete and sign this form.
- I understand and agree that this application will be governed by the relevant and latest Investment Agreement and I have read and understood the Portfolio Characteristics document and the fund fact sheet that relates to the unit trust portfolios I am investing in.
- I have used the Effective Annual Cost calculator and I am aware of the charges that may be incurred.
- I authorise Nedgroup Investments to accept this instruction as submitted (electronically or otherwise) and agree that Nedgroup Investments will not be held liable for acting on this application and/or any instructions contained herein.
- The information contained in this form may be reported to the South African tax authorities.

Investor / Authorised  
signatory

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
D	D	M	M	Y	Y	Y	Y

Name

Capacity

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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