

Initial Investment Phase-in

Investment products (excluding Living Annuity)

This form will only be accepted when submitted with a completed and signed initial 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 (after tax if applicable).

INVESTOR DETAILS

Investor name

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 via from the money held in the Nedgroup Investments Core Income Fund pending phase-in (if applicable). % (excl VAT)

UNIT TRUST PORTFOLIO SECTION

Unit trust portfolio	Percentage allocation	Only applicable if investing with a financial planner
		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 than the maximum is specified, the maximum will apply.

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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