

Living Annuity

Income revision



1. What you need to know

1. Before completing this form please read the latest relevant Investment Agreement - which can be obtained from your financial planner or our Client Service Centre.
2. We will process your instruction once we have received a completed and signed form.
3. The cut-off for receipt of instructions is 14:00, five business days before the 20th day of the income anniversary month.
4. Information filled in outside of the relevant fields will not be considered when processing your instruction.
5. Return the completed and signed form with the relevant supporting documents to us via email to nedgroupinvestments@silica.net (please print and sign the form before scanning and emailing it to us, as an authorised signature is required for processing).
6. 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. Investor details

Investor number

Title and surname

First names

SA ID number

Passport number
(if foreign national)

Passport expiry date

D D M M Y Y Y Y

3. Revised income details

Client account group number

The income from your Living Annuity client account group may only be amended annually on the income anniversary month.

Frequency choice		Income requirement	
Select one		Percentage	OR Rand amount (before tax)
✓		%	R
	Monthly in arrears		
	Quarterly in advance		
	Bi-annually in advance		
	Annually in advance		

Please indicate a required tax rate if different from the standard tax tables: %

Please note

- If not indicated, tax will be deducted in accordance with income tax legislation.
- If a tax rate lower than the rate applicable in terms of the tax tables is required, a tax directive must be submitted with this form. This directive will be valid only for the period stipulated thereon. You may renew this by applying to SARS. If a new updated tax directive is not received prior to the expiry of the outdated one, normal tax table rates will apply.

5. 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

6. Investor declaration

I confirm and certify that:

- I am responsible for my investment decisions and have considered whether this instruction is suitable for my needs.
- I am authorised to act on behalf of the investor (if applicable) and I will be personally responsible for this instruction should this not be the case.
- I did not receive advice from Nedgroup Investments about this instruction.
- I understand and agree to the information in the latest relevant Investment Agreement.
- I have read and understand the contents including the terms and conditions of this form.
- All of the information, instructions and documents provided by me or on my behalf about this instruction, whether in my handwriting or not, are accurate and complete.
- Nedgroup Investments may only accept instructions from my financial planning business or any authorised third party if I appoint them and authorise this in writing.
- I am aware that I need to inform Nedgroup Investments if any of my details change.

Where the financial planning details section has been completed:

- The financial planning business is my appointed financial planning business until I instruct Nedgroup Investments otherwise.
- The financial planner listed, as authorised representative of the financial planning business, is my appointed financial planner.
- My appointed financial planning business will have access to my investment details via Nedgroup Investments' secure online website.

Investor / Authorised signatory

Date
D D M M Y Y Y Y

Name

Capacity

Authorised signatory (if applicable)

Date
D D M M Y Y Y Y

Name

Capacity

Authorised signatory (if applicable)

Date
D D M M Y Y Y Y

Name

Capacity

Authorised signatory (if applicable)

Date
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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