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FundiSA beneficiary change

NEDGROUP INVESTMENTS

1. What you need to know

1. Before completing this form, please read the Nedgroup Investments FundiSA Frequently Asked Questions document. These can be obtained from our website www.nedgroupinvestments.com.
2. Beneficiaries may only be changed once per calendar year.
3. Beneficiaries do not need to be related to the investor but must:
   - have a household income of less than R180 000 per year;
   - are under 35 years of age; and
   - are SA nationals or permanent residents.
4. If completing this form by hand, please complete all relevant information legibly to avoid processing delays. Note that 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. We will process your instruction once we have received:
   - A completed and signed form; and
   - All relevant supporting documents.
7. The daily cut-off for receipt of instructions is 14:00.
8. If you have any questions about this form please contact our Client Service Centre on **0860 123 263**.

2. Investor details

Investor number

Title and surname

First names

Date of birth
D D M M Y Y Y Y

SA ID number

Contact number for this instruction + (0)

Please note

- If you wish to change any of your personal details, please complete and submit a Details Change form, available from our website at www.nedgroupinvestments.co.za or your financial planner (if applicable).

3. Beneficiary details

Current beneficiary

Please complete the names of any current beneficiary(ies) that are to be removed. You may not add a new beneficiary unless you are replacing an existing beneficiary with a new one.

FIRST BENEFICIARY

Title and surname

First names

SA ID number

SECOND BENEFICIARY

Title and surname

First names

SA ID number

New beneficiary

Please note

- This beneficiary will be added to your FundiSA investment.
- The beneficiary's household income refers to the combined income of the parents / guardians of the beneficiary.
- If the beneficiary's household income is more than R180 000 per year, they are not eligible for the FundiSA Fund.
- If you would like to add more than two new beneficiaries, please copy this page, complete and submit with this form.
- For multiple beneficiaries, percentages allocated must total 100% (no decimal points). Please remember to allocate percentages according to the final number of beneficiaries after this Beneficiary Change Form has been completed.
- We require a copy of each new beneficiary's South African ID or South African birth certificate.

FIRST NEW BENEFICIARY

Percentage allocation (no decimals) % Relationship

Title and surname

First names

SA ID number

SECOND NEW BENEFICIARY

Percentage allocation (no decimals) % Relationship

Title and surname

First names

SA ID number

4. Investor declaration

I confirm that:

- I am responsible for my investment decisions and have considered whether this instruction is suitable for my needs.
- I understand and agree to the information in the Nedgroup Investments Frequently Asked Questions document that pertains to FundiSA.
- I am aware that FundiSA grants are reserved strictly for the tertiary education of students from households earning less than R180 000 per year.
- I did not receive advice from Nedgroup Investments about this instruction.
- All of the 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 accept signed instructions by fax or email and will not be responsible for any failure or delay of any networks, electronic or mechanical device or any other forms of communication used for submitting and processing my instructions.
- I am aware that Nedgroup Investments may share my personal information within the Nedbank Group, with the National Student Financial Aid Scheme (NSFAS) or where required by law or contractual agreement.
- Nedgroup Investments may only accept instructions from any authorised third party if I appoint them and authorise this in writing.
- I will have access to my investment details via Nedgroup Investments' secure online website if registered for this access.
- I am aware that Nedgroup Investments may close my investment account if my investment value is less than R40 from the date of investment.
- I am aware that I need to inform Nedgroup Investments if any of my details change.

Investor / Authorised signatory		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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