Withdrawal
Tax free investment

NEDGROUP INVESTMENTS

1. What you need to know

Compliance with the Financial Intelligence Centre Act, 38 of 2001 (FICA) is required to process your instruction - if you have not previously submitted the necessary supporting documentation to us or your authorised financial planner, please do so with this form.

1. Before completing this form please read the latest relevant Investment Agreement - which can be obtained from our website: **www.nedgroupinvestments.com**, 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 daily cut-off for receipt of instructions is 14:00.
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. Tax free investments notes

1. You can withdraw from your tax-free investment at any time.
2. Withdrawn amounts that are re-invested will be treated as additional contributions and therefore be subject to your annual contribution threshold of R33 000 as well as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.

3. Investor details

Investor number

Title and surname

First names

SA ID / passport number

Expiry date

D D M M Y Y Y Y

4. Withdrawal details

Is this a full withdrawal across all unit trust portfolios? ☐ Yes ☐ No

If yes, cancel all debit orders? ☐ Yes ☐ No

If you require a partial withdrawal please complete the table below.

		Select EITHER a withdrawal % OR rand amount		Debit order instruction	
Unit trust portfolio	**Account number**	**Percentage**	**Rand amount**	**Continue**	**Cancel**
	Total	%	R		

Please note

- If you do not indicate how we should administer existing debit orders they will continue.
- The value of the amount available to you may change between the date of completing the form and the date the withdrawal is processed.
- If your withdrawal instruction decreases the market value of the unit trust portfolio selected to R2 500 or less and you don't have an active debit order, we will pay out the entire balance.
- If you are making a 100% withdrawal from a unit trust portfolio that pays an annual financial planning fee via the sale of units, any accrued fees will be paid to the financial planner before the withdrawal is processed.
- Withdrawals are payable within two business days of processing your instruction, (one business day for Nedgroup Investments Money Market Fund).

5. Investor bank account details

Please note

- No third party payments will be processed.
- 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. 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 understand and agree to the information in the latest relevant Investment Agreement.
- I am authorised to act on behalf of the investor (if applicable) and that I will be personally responsible for this instruction should this not be the case.
- I have read and understand the contents including the terms and conditions of this form.
- I did not receive advice from Nedgroup Investments about this instruction.
- 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.

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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