

4. Estate late bank account

Please note:

- It is mandatory to complete this section
- Please provide proof of bank account

Name of account holder (as registered with bank)

SA ID number / Passport number / Registration number
(as registered with bank)

Name of bank

Account number

Name of branch

Code

Account type

Current

Savings

Country

5. Unit Trust only: Transfer of ownership instruction

Please note:

- To process a transfer of ownership, this form must be submitted with:
 - If transferee is an existing investor: 'Client Details – Existing Individual Investor' form
 - If transferee is a new investor: 'Client Details – New to Nedgroup Investments Individual' form
- For more than one transfer, please submit a separate form for each transferee
- This transaction may attract Capital Gains Tax (CGT)
- If transferring from the Nedgroup Investments Money Market Fund, any accrued income distribution will be transferred to the transferee
- The units transferred will be invested in the same portfolio and class as held by the deceased investor
- Income distributions will be reinvested.
- Should you wish to perform any of the following transaction once the investment has been transferred, please submit the relevant form which can be obtained from our Client Services Centre:
 - Debit order
 - Switch
 - Recurring withdrawal
 - Income distribution method change
 - Financial planner fee change

5.1 Transferee details

Existing transferee investor

Existing investor name

Existing investor number

New transferee investor

New investor name

SA ID number / Passport number / Registration number

5.2 Transfer details

Is this a transfer to the deceased's spouse? Yes No

If 'Yes', please submit a copy of the marriage certificate.

		Please select EITHER a percentage OR a rand amount	
Unit Trust portfolio	Account number	Percentage	Rand amount
		%	R
	Total	%	R

5.3 Transferee bank account details

If the transferee is new to Nedgroup Investments, it is mandatory to complete this section.

Please note:

- The following bank account details will be used for all withdrawal requests unless notified of new bank account details
- 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

Name of account holder (as registered with bank)

Name of bank

Account number

Name of branch Code

Account type Current Savings Country

5.4 Transferee 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 a single amount with frequent withdrawals

Invest multiple amounts with frequent withdrawals

Invest a single amount with occasional withdrawals

Invest multiple amounts with occasional withdrawals

5.5 Transferee declaration

I, the undersigned transferee, confirm and certify that:

- 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

Transferee / Authorised signatory 1

Date

D	D	M	M	Y	Y	Y	Y
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Name

Capacity

6. Unit Trust only: Security cession declaration

Please confirm whether any of the Unit Trust portfolio(s) from which you have requested a withdrawal or transfer have been ceded as security

Yes

No

If 'Yes', please return this form together with a letter from the cedent to which the investment is ceded, agreeing to your withdrawal request.

7. Declaration and signature

I confirm and certify that:

- The information I have completed in this form is to the best of my knowledge true and correct
- I understand that further information may be requested, and that the information provided may be corroborated with third parties

Authorised signatory 1

Date

D	D	M	M	Y	Y	Y	Y
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Full name

Capacity

Authorised signatory 2

Date

D	D	M	M	Y	Y	Y	Y
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Full name

Capacity

Authorised signatory 3

Date

D	D	M	M	Y	Y	Y	Y
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Full name

Capacity

Nedgroup Investments

Nedbank Clocktower Clocktower Precinct V&A Waterfront Cape Town 8001 PO Box 1510 Cape Town 8000 South Africa

Nedgroup Investments Proprietary Limited (Company registration number 1996/017075/07)

Incorporating Nedgroup Collective Investments (RF) Proprietary Limited (Company registration number 1997/001569/07)

Nedgroup Investment Advisors Proprietary Limited (Company registration number 1998/017581/07) an authorised Financial Services Provider (FSP licence number 1652)

Directors: NA Andrew, RC Williams

www.nedgroupinvestments.com