

Adviser Notice 75

October 2021

Dear Adviser

PSG Wealth forms review project: decommissioning of forms

In April 2019 we embarked on a forms review project to streamline our existing forms. The project has provided a valuable opportunity to improve processes, consolidate forms and ultimately reduce paperwork. As part of phase 2 of the project, we have reviewed all our transactional forms and we are pleased to inform you that we have identified a number of forms that we can decommission.

Decommissioned forms

As a result of our latest review process, some of our forms have been decommissioned as of 1 July 2021. Please make use of the replacement forms as detailed below. All our latest forms are available via our [public facing website](#), and are also available to PSG advisers via [myBase](#).

Decommissioned form	Replacement form
Application to transfer out	Transfer out form
NIB Loan repayment form	Additional contribution form
Nil interest-bearing loan	Withdrawal form
Surrender/Maturity	Withdrawal form
Consolidation form	Consolidate your investment form
Annexure J- Representative PSP SLA - PSG	Portfolio manager registration form

Need more information?

If you have any queries, please contact your investment specialist or your dedicated client service team.
Kind regards



Cindy Tshabalala
Head of Client Service