

Adviser fee revision form

- Use this form to confirm or change the advisory fees we pay to your financial adviser.
- You cannot use this form to review your ongoing financial adviser fee for a PSG Wealth Retirement Annuity where a Section 14 transfer was done. You need to complete the Section 14 fee revision form.
- Send the completed form to instructions@psg.co.za.
- If you need assistance, please contact your financial adviser or one of our client service consultants on 0860 774 774 or at clientservice@psg.co.za.

Investor details

Name and surname/Name of company or trust

ID/Passport number/Registration number

Investment number

Adviser details

Name and surname

FSP name

FSP code

Financial adviser code

Agency code

New advisory fees

I agree to pay my financial adviser the following advisory fees on the investment listed in the Investor Details section:

Recurring contribution % excl. VAT

Additional contributions % excl. VAT

Ongoing financial advisory fee % excl. VAT

Model portfolio management fee % excl. VAT

Please indicate any fund-specific fees in the table below:

Fund name	Class	Ongoing financial advisory fee (excl. VAT)	
			%
			%
			%
			%
			%



Fees

You may choose to have your ongoing investment administration fee and financial adviser fee deducted from a specific fund instead of proportionately from each fund. This will be known as your preferred fee fund.

Do you require a preferred fee fund? ☐ Yes ☐ No

Fund name	Fund class

Signatures

By signing this form, I confirm that:

- I have given PSG accurate information.
- I understand that PSG Invest, as the administrator of this investment, is not authorised to provide any financial advice.
- my appointed financial adviser will have access to my investment details.
- I have read and accept the terms and conditions of my investment.
- I authorise PSG to pay the fee to my financial adviser on my behalf.

Investor

Investor signature Date

If you are signing on behalf of the investor, please provide your details below.

Name Surname
ID/Passport number Designation
Signature

Financial adviser

Signature Date

Contact details

Physical address: Building 1, The Ingress, Corner of Magwa and Lone Creek Crescents, Waterfall City, Waterfall, 2090, Gauteng, South Africa
Postal address: PO Box 61295, Marshalltown, 2107
Sharecall: 0860 774 774
Email: clientservice@psg.co.za
Website: www.psg.co.za