

## Annual annuity revision form

- Use this form to specify the annuity income you want to be paid out of your PSG Wealth Equity Linked Living Annuity.
- You can change the amount and frequency of your annuity income annually on the anniversary of your investment. If we do not hear from you, your pre-tax annuity will continue according to the frequency, rand amount or percentage specified in the last instruction we received from you.
- We must receive this form 10 business days before the anniversary date.
- Send the completed form to [instructions@psg.co.za](mailto: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](mailto:clientservice@psg.co.za).

### Investor details

Name and surname

ID/Passport number

Investment number

### Would you like to change your annuity income?

Would you like to change your pre-tax annuity income? ☐ Yes ☐ No

How much pre-tax annuity income would you like to receive?

R  per year

or  % of my investment value

Payment frequency: ☐ Monthly ☐ Quarterly ☐ Twice a year ☐ Once a year

From which of the funds you have invested in would you like to withdraw your income?

☐ Withdraw proportionately from all funds, or

☐ Withdraw from the funds selected in the table below:

- You must either select an amount or a percentage of the value of your investment.
- Your pre-tax annuity income must be between 2.5% and 17.5% of the value of your investment.
- If you select the monthly payment please note that payment is made at the end of the month in arrears. Quarterly, six-monthly and yearly payments are made in advance.
- Monthly payments will be made on the 25<sup>th</sup> of the month. If the 25<sup>th</sup> falls on a weekend or a public holiday, the payment will be made on the preceding business day.

Fund name	Fund class	Percentage	
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
Total		100	%



Annuity income will only be paid into the investor's South African bank account.

Account holder	<input type="text"/>		
Bank name	<input type="text"/>	Branch code	<input type="text"/>
Account number	<input type="text"/>	<input type="checkbox"/> Cheque/Current	<input type="checkbox"/> Savings

## 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.

## Investor

Investor signature	<input type="text"/>	Date	<input type="text"/>
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If you are signing on behalf of the investor, please provide your details below.

Name	<input type="text"/>	Surname	<input type="text"/>
ID/Passport number	<input type="text"/>	Designation	<input type="text"/>
Signature	<input type="text"/>		

## Financial adviser

Adviser signature	<input type="text"/>	Date	<input type="text"/>
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## 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, South Africa

**Sharecall:** 0860 774 774

**Email:** [clientservice@psg.co.za](mailto:clientservice@psg.co.za)

**Website:** [www.psg.co.za](http://www.psg.co.za)