

Beneficiary nomination form

- Use this form to change beneficiaries on your PSG Wealth Retirement Annuity Fund, PSG Wealth Preservation Pension Fund, PSG Wealth Preservation Provident Fund, PSG Wealth Equity Linked Living Annuity or PSG Wealth Endowment.
- Only individuals may complete this form. Entities cannot nominate beneficiaries.
- This form will replace all previous beneficiary nominations that we have on record.
- We must receive this form while you are still alive. We cannot process a change of beneficiaries after your death.
- 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	<input type="text"/>
ID/Passport number	<input type="text"/>
Investment number	<input type="text"/>

Nominate your beneficiaries

Beneficiaries of your PSG Wealth Retirement Annuity Fund, PSG Wealth Preservation Pension Fund or PSG Wealth Preservation Provident Fund

The trustees of the funds will identify all your dependents (whether you nominated them as beneficiaries or not) and ensure that your beneficiaries are paid fairly. Your nomination will help the trustees to perform their duties, but your nominations may not be honoured.

Please list **all** of the beneficiaries you would like to nominate to receive the proceeds of your investment when you pass away. The nominations you make here will replace all previous nominations, so if you have previously nominated beneficiaries that you want to keep as beneficiaries, please list them here too.

Beneficiaries

Individuals							
Title	First name(s)	Surname	Date of birth	ID number*	Relationship to you	Dependant (Yes/No)	% benefit
							%
							%
							%
							%
							%
						Total	100 %

*passport number if you are not a South African citizen

Other dependants

Individuals							
Title	First name(s)	Surname	Date of birth	ID number*	Relationship to you	Dependant (Yes/No)	% benefit
							%
							%
							%
							%
							%
						Total	100 %

*passport number if you are not a South African citizen



Beneficiaries of your PSG Wealth Endowment or PSG Wealth Equity Linked Living Annuity

Please list all of the beneficiaries you would like to nominate to receive the proceeds of your investment when you pass away. The nomination you make here will replace all previous nominations, so if you have previously nominated beneficiaries that you want to keep as beneficiaries, please list them here too.

Primary beneficiaries

Individuals						
Title	First name(s)	Surname	Date of birth	ID number*	Relationship to you	% benefit
						%
						%
						%
						%
						%

*passport number if you are not a South African citizen

Trusts (South African registered only)		
Registered trust name	Registration number	% benefit
		%
		%
		%
		%
		%

Total	100	%
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Alternative beneficiaries

Individuals						
Title	First name(s)	Surname	Date of birth	ID number*	Relationship to you	% benefit
						%
						%
						%
						%
						%

*passport number if you are not a South African citizen

Trusts (South African registered only)		
Registered trust name	Registration number	% benefit
		%
		%
		%
		%
		%

Total	100	%
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Spouse consent

This section only applies if you are nominating beneficiaries for a PSG Wealth Endowment.

Are you married in community of property? ☐ Yes ☐ No

If you are married in community of property you require your spouse's written consent to nominate another beneficiary.

To be completed by the investor's spouse:

Spouse Name and surname

I consent to the nomination of the beneficiaries in this form.

Spouse signature Date

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 Date

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

Name Surname
ID/Passport number Designation
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