

Consolidate your investments

- Use this form to consolidate your investments.
- This form cannot be used to transfer investments between two investors, to change the type of investment you have, or to transfer part of an investment.
- 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/Registration number

Before you consolidate

- Consolidating investments may trigger a Capital Gains Tax event, depending on the products being consolidated.
- Consolidating investments in the PSG Wealth Preservation Funds will count as your one early withdrawal before retirement. You will not be entitled to any further withdrawals.
- You can only consolidate two PSG Wealth Equity Linked Living Annuities if the income frequency is the same for both annuities. If it is not, you can change the frequency on the anniversary of your investment, and then consolidate the annuities. If the income frequency is the same, and you consolidate your PSG Wealth Equity Linked Living Annuities, you cannot use this form to update the income amount or frequency. The date on this form will become your new anniversary date, and you will only be able to review your annuity income on your next investment anniversary.

Which investments do you want to consolidate?

Investment number of the investment you want to transfer from

Investment number of the investment you want to transfer to

Do you want to change your recurring contribution?

How much would you like to invest by debit order into the consolidated investment? R

Minimum R500 per month

Debit order start date

Frequency

☐

Monthly

☐

Quarterly

☐

Twice a year

☐

Once a year

If you would like to escalate annually: % escalation

Select the funds in which you would like to invest from the list of available funds at www.psg.co.za. You can select a maximum of 10 funds to invest in.

- If you are consolidating PSG Wealth Voluntary Investment Plans, PSG Wealth Tax Free Investment Plans or PSG Wealth Retirement Annuities, you can change your recurring contribution here.
- If you don't provide new instructions for your recurring contributions, we will not change the debit order for the investment you are transferring into.



Would you like to change your recurring withdrawal?

This section is not applicable to PSG Wealth Equity Linked Living Annuities.

We will pay you as close as possible to this date, but we cannot guarantee payments on specific dates.

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

- If you are consolidating PSG Wealth Voluntary Investment Plans, PSG Wealth Tax Free Investment Plans or PSG Wealth Retirement Annuities, you can change your recurring contribution here.
- If you don't provide new instructions for your recurring withdrawal, we will not change the existing instruction for the investment you are transferring into.

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Signatures

By signing this form, I confirm that:

- I have given PSG complete and accurate information.
- I understand that PSG Invest, as the administrator of this investment, is not authorised to provide any financial advice.
- I understand that my appointed financial adviser will have access to my investment details.
- I have read and accept the terms and conditions of my investment.
- if I am also responsible for payments to this investment, I agree that for this investment you can collect money from my bank account(s), and that I am an authorised signatory on the bank account(s).

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

Adviser signature

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

Website: www.psg.co.za