

Emergency 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.
- Individuals who receive funds from a living annuity will temporarily be allowed to immediately either increase or decrease the proportion they receive as annuity income, instead of waiting up to one year until their next contract "anniversary date".
- As the Regulations have not been published yet we are unclear for how long individuals will be able to benefit from this window to change their withdrawal rates and whether it will only be a temporary change or last until the next anniversary date.
- For changes to May 2020 income, completed forms will need to be submitted by 8 May 2020.
- 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

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

*Changes to payment frequency will only be actioned once confirmed by a change to the regulations.

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 0.5% and 20% 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 25th of the month. If the 25th 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

Sharecall: 0860 774 774

Fax: +27 (11) 996 5499

Email: clientservice@psg.co.za

Website: www.psg.co.za