

Internal transfer form

- Use this form if you would like to transfer from one PSG Wealth investment product to another of your own.
- Use this form to transfer from the PSG Wealth Voluntary Investment Plan to PSG Wealth Voluntary Investment Product, PSG Wealth Retirement Annuity fund or PSG Wealth Tax Free Investment Plan.
- Do not use this form to consolidate investments (transfer your entire investment to the same type of product in your name). To consolidate investments of the same type of product, please complete a [Consolidation 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

ID/Passport number

Investment details

Transfer from (Investment number)

Transfer to:

Existing investment (Investment number)

☐ New investment (please attach relevant application form)

Transfer details

How must your investment be transferred?

Would you like to transfer the full value of the investment?

☐ Yes ☐ No

If 'Yes':

Would you like to close your investment?

☐ Yes ☐ No


Would you like to cancel your debit order?

☐ Yes ☐ No

If 'No', please indicate the funds and amounts to be transferred in the table below.

Transfer funds from	Fund class	Amount

Note: If you are transferring to a new investment, you do not need to complete the rest of the form. Please skip to the 'Signatures' section.

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- If you don't close your investments, all your recurring contributions and regular withdrawals remain in place.



If you are transferring to an existing investment, please indicate the fund allocation in the table below.

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

Change the existing recurring contribution fund allocation on the receiving investment

If you have an existing debit order on the fund that you are transferring, and the receiving fund allows debit orders, you may change the details of your debit order here.

Would you like to cancel your existing debit order?

☐ Yes ☐ No

Do you want to change your existing recurring contribution details?

☐ Yes ☐ No

If 'Yes', please update details in the below.

How much would you like to invest by debit order? R

Debit order start date

Frequency: ☐ Monthly ☐ Quarterly ☐ Twice a year ☐ Once a year

If you would like to escalate annually: % escalation

Please select the funds in which you would like to invest from the list of available funds on our website at www.psg.co.za.

Please indicate your selected fund(s):

☐ Keep the existing fund allocation for my recurring contribution, or☐ Allocate funds as indicated in the table on the following page



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

Change the existing regular withdrawal on the receiving investment

If you have an existing recurring withdrawal on the fund that you are transferring from, and the receiving fund allows recurring withdrawals, you may change the details of your debit order here.

Would you like to cancel your recurring withdrawal?

☐ Yes ☐ No

Do you want to change your existing recurring withdrawal details?

☐ Yes ☐ No

If 'Yes', please indicate in the table below.

How much would you like to withdraw? R

Frequency: ☐ Monthly ☐ Quarterly ☐ Twice a year ☐ Once a year

If you would like to escalate annually: % escalation

Income payment date

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 your income?

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

Withdrawals will only be allowed after the clearance period of (21 days for direct deposits and 45 days for debit orders).



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.
- 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 can sign for the bank account(s).

Investor

Investor signature

Date

Financial Adviser

Receiving investor signature

Date

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

Name

Surname

ID/passport number

Designation

Signature

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

Name

Surname

ID/passport number

Designation

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