

## Offshore currency conversion form

- Use this form to transfer funds from your local broker dealer account (BDA) to your offshore trading account held with PSG Securities.
- Send the completed form to [PSGWealth.offshore@psg.co.za](mailto:PSGWealth.offshore@psg.co.za).
- If you need assistance, please contact your financial adviser or a member of our offshore team on 011 996 5200 / 0860 774 774 or at [PSGWealth.offshore@psg.co.za](mailto:PSGWealth.offshore@psg.co.za).

### Accountholder details

Name and surname/Name of company or trust	<input type="text"/>
ID/Passport/Registration number	<input type="text"/>
Source local BDA number	<input type="text"/>
Destination offshore trading account number	<input type="text"/>

### Transfer details

Please provide the relevant details below.

ZAR amount to be converted

Convert to other currency?

Yes ☐ No ☐

If you selected 'Convert to other currency', please confirm currency

☐ Trade at best, or

☐ Confirm indicative rate

Special instructions

Please submit the following documents with this instruction;

- A copy of your ID
- RMB Global outwards form
- FNB Discretionary allowance (under R1 million)
- Tax clearance certificate (over R1 million)

### Signatures

By signing this form, I/we confirm that:

- I/we have given PSG accurate information.
- I/we indemnify PSG from any liability, loss or damages related to this repatriation of funds.
- I/we indemnify PSG from any loss incurred due to any incorrect information provided in this form.
- I/we understand that PSG does not provide financial advice.
- my/our appointed financial adviser (if applicable) will have access to my/our investment details.
- I/we have read and accept the terms and conditions applicable to my/our investment.

### Accountholder

Accountholder signature

Date



If the payment is from a joint share trading account, all account holders must sign below:

Signature of joint investor 1  
(If applicable)

Date

Signature of joint investor 2  
(If applicable)

Date

Signature of joint investor 3  
(If applicable)

Date

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

Name

Surname

ID/Passport number

Designation

Signature

### Financial adviser

Adviser 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, 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)