

- Use this form to change your personal, tax or banking details. If you leave a field blank, we will assume that it has not changed.
- 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.

Existing investor details

Name and surname/Name of company or trust	<input type="text"/>
ID/Passport number/Registration number	<input type="text"/>
Investment number	<input type="text"/>

Changes to personal details

Individual details

First names	<input type="text"/>
Surname	<input type="text"/>
ID/Passport number	<input type="text"/>

If your name, ID or physical address has changed, please submit the relevant FICA documents. [Visit our website](#) for the list of FICA documents required for individuals.

Entity details

Entity name	<input type="text"/>
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[Visit our website](#) for the list of FICA documents required from entities.

Your occupation or business (individual and entity details)

What is your occupation?

<input type="checkbox"/> Clerical support	<input type="checkbox"/> Head of government/cabinet minister/judge
<input type="checkbox"/> General staff	<input type="checkbox"/> Professional
<input type="checkbox"/> Management	<input type="checkbox"/> Self-employed
<input type="checkbox"/> Religious leader	<input type="checkbox"/> Traditional leader/royal family
<input type="checkbox"/> Executive	Other <input type="text"/>
<input type="checkbox"/> Unemployed	

Our risk-based approach to money laundering means we must record your occupation.

What industry do you work in?

<input type="checkbox"/> Administrative and support service	<input type="checkbox"/> Financial, investment and insurance
<input type="checkbox"/> Agriculture, forestry and fishing	<input type="checkbox"/> Gambling
<input type="checkbox"/> Arts, entertainment and hospitality	<input type="checkbox"/> Government, state-owned enterprise, armed forces
<input type="checkbox"/> Construction	<input type="checkbox"/> Human health and social work activities
<input type="checkbox"/> Electricity, water, gas supply and waste management	<input type="checkbox"/> Information, technology and communication

Our risk-based approach to money laundering means we must record the industry in which you work. Different industries have different exposures to money laundering risk, and we need to determine whether you operate in an industry that is subject to anti-money laundering measures.

- | | |
|---|--|
| <input type="checkbox"/> Manufacturing, wholesale or retail | <input type="checkbox"/> Professional, scientific, technical and education |
| <input type="checkbox"/> Mining and quarrying | <input type="checkbox"/> Real estate |
| <input type="checkbox"/> Motor vehicles, transportation, distribution | <input type="checkbox"/> Unemployed |
| <input type="checkbox"/> Non-profit/religious organisation | Other <input type="text"/> |
| <input type="checkbox"/> Politics | |

PIPs and PPOs are or were local prominent influential people or foreign prominent public officials. If the investor is a family member, close associate, or a prominent member of the same political party, organisation or union as a PIP or PPO, the investor is also considered to be a PIP or PPO. This includes heads of state, cabinet ministers, government officials, influential officials and political and military leaders.

Are you a Prominent Influential Person (PIP) or Prominent Public Official (PPO)?

☐ Yes ☐ No

Contact details

Cell phone Work number

Email address

Physical address: Unit and street

Suburb Code

Town/City Province

Country

Postal address if it differs from your physical address:

Postal address: PO Box

Suburb Code

Town/City Province

Country

Changes to tax details

Are you a registered taxpayer in South Africa? ☐ Yes ☐ No

South African income tax number

Please submit a copy of a SARS document that confirms your tax number.

Are you exempt from Dividend Withholding Tax (DWT), or do you qualify for a reduced withholding tax rate?

☐ Yes ☐ No

Are you exempt from Withholding Tax on Interest (WTI), or do you qualify for a reduced withholding tax rate?

☐ Yes ☐ No

If your answer to either question was 'Yes', please complete the dividends tax declaration available on www.psg.co.za. The default rate will be applied if you do not complete the declaration.

Changes to banking details

You may provide details for more than one bank account.

If you are providing new bank details here, we need proof of banking details not older than three months.

	Investor account A	Investor account B	Third party account
Account holder			
Bank name			
Account number			
Branch code			
Cheque/Current or Savings	<input type="checkbox"/> Cheque/Current	<input type="checkbox"/> Cheque/Current	<input type="checkbox"/> Cheque/Current
	<input type="checkbox"/> Savings	<input type="checkbox"/> Savings	<input type="checkbox"/> Savings

Which account should we use for which transaction?

	Investor account A	Investor account B	Third party account
Recurring contribution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recurring withdrawal	<input type="checkbox"/>	<input type="checkbox"/>	

If a third party is contributing to your investment, we need their details and FICA documents.

Name and surname of account holder

ID/passport number of account holder

Physical address of account holder

Third party authorisation

I authorise PSG to draw the debit order amount from the South African bank account I have provided.

Account holder 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.
- 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

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: Box 61295, Marshalltown, 2107, South Africa

Sharecall: 0860 774 774

Email: clientservice@psg.co.za

Website: www.psg.co.za