

## Phase-in Form

- Use this form to switch from one fund to another in phases. If you would like to switch from one fund to another without phasing the investment in, you should complete the Switch and Rebalance Form.
- Send the completed form to [instructions@psg.co.za](mailto: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](mailto:clientservice@psg.co.za).

### Investor details

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

### Phase-in

You may only select one of the below source funds to phase in from. The PSG Wealth Enhanced Interest Fund (D) is only available to clients of PSG Wealth Financial Planning advisers.

Source fund for phase-in instruction (must also be listed in table above)	Fund class	Percentage	
PSG Money Market Fund	F	<input type="text"/>	%
PSG Wealth Enhanced Interest Fund	D	<input type="text"/>	%

Destination fund(s) for phase-in instruction	Fund class	Percentage	
<input type="text"/>	<input type="text"/>	<input type="text"/>	%
<input type="text"/>	<input type="text"/>	<input type="text"/>	%
<input type="text"/>	<input type="text"/>	<input type="text"/>	%
<input type="text"/>	<input type="text"/>	<input type="text"/>	%
<input type="text"/>	<input type="text"/>	<input type="text"/>	%
<input type="text"/>	<input type="text"/>	<input type="text"/>	%
<input type="text"/>	<input type="text"/>	<input type="text"/>	%
<input type="text"/>	<input type="text"/>	<input type="text"/>	%
<input type="text"/>	<input type="text"/>	<input type="text"/>	%
<input type="text"/>	<input type="text"/>	<input type="text"/>	%
<b>Total</b>		<b>100</b>	<b>%</b>

Phase-in commencement date

Phase in weekly ☐ Number of phase-in transactions  (select number of transactions from 1 to 52).

or

Phase in monthly ☐ Number of phase-in transactions  (select number of transactions from 1 to 12).



Must your recurring contribution be invested in your new destination funds with immediate effect? ☐ Yes ☐ No

Must your current recurring withdrawal be withdrawn from your new destination funds with immediate effect? ☐ Yes ☐ No

## Preferred fee fund

You may choose to have your ongoing investment administration fee and financial adviser fee deducted from a specific fund instead of proportionately from each fund. This will be known as your preferred fee fund.

Do you require a preferred fee fund? ☐ Yes ☐ No

Fund name	Fund class

## 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

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

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)