

Portfolio manager registration form

- Use this form if you are a PSG Wealth adviser who wishes to confirm that they have the authority to manage Private Share Portfolios (PSP) on behalf of their clients.
- This form may only be completed by a portfolio manager who is registered as a Category II PSG financial adviser and who received a discretionary mandate from their client to manage a PSP.
- The PSP is only available as an investment option in the PSG Wealth Retirement Annuity, the PSG Wealth Preservation Pension Fund, the PSG Wealth Preservation Provident Fund or the PSG Wealth Equity Linked Living Annuity.
- These investments are underwritten by PSG Life Ltd and administered by PSG Invest (Pty) Ltd. Share trading in the PSP is executed by PSG Securities Ltd, a member of the JSE.
- Send the completed form, along with the supporting documents, 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.

Adviser details

Name and surname	<input type="text"/>
ID/Passport number	<input type="text"/>
Financial adviser code	<input type="text"/>
Agency code	<input type="text"/>

Contact details

Telephone number	<input type="text"/>		
Email address	<input type="text"/>		
Physical address: Unit and street	<input type="text"/>		
	<input type="text"/>		
Suburb	<input type="text"/>	Code	<input type="text"/>
Town/City	<input type="text"/>	Province	<input type="text"/>
Country	<input type="text"/>		

Signatures

By signing this form I confirm that I:

- am duly authorised to act on behalf of PSG Wealth Financial Planning (Pty) Limited.
- am appropriately authorised by the Financial Sector Conduct Regulator act as a portfolio manager.
- will only manage Personal Share Portfolios for clients who have given me the express written authority to act on their behalf (a discretionary mandate).

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

Website: www.psg.co.za