

# Recurring contribution and recurring withdrawal changes form

- Use this form to make changes to your recurring contributions to or withdrawals from your investment.
- 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"/>

## Recurring contribution details

Would you like to cancel your existing debit order? ☐ Yes ☐ No

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

Debit order start date

How often? ☐ Monthly ☐ Quarterly ☐ Twice a year ☐ Once a year

## Where does the money come from?

We are required by law to ask where the money comes from, and in some cases to verify the source of the investment. Please tick the appropriate blocks for your lump-sum contribution, recurring contribution, or both.

	Lump-sum investment
Business income/profits	<input type="checkbox"/>
Credit	<input type="checkbox"/>
Donations/Gifts/Inheritance/Winnings	<input type="checkbox"/>
E-gambling	<input type="checkbox"/>
Passive income (rental, dividends, interest)	<input type="checkbox"/>
Pension interest in a divorce order	<input type="checkbox"/>
Property sale	<input type="checkbox"/>
Retirement annuity fund/Insurance/Tax payout	<input type="checkbox"/>
Salary/Bonus	<input type="checkbox"/>
Savings	<input type="checkbox"/>
Transfer	<input type="checkbox"/>
Other (please specify) <input type="text"/>	<input type="checkbox"/>

If you would like to escalate annually:  % escalation





## How would you like to pay?

### Bank details

You may provide details for more than one bank account.

	Investor account A	Investor account B	Third party account
Account holder			
Bank name			
Account number			
Branch code			
Account type	<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

Please submit the following FICA documents with your instruction:

- A copy of the third party's ID (or passport if he or she is not a South African citizen)
- Proof of third party's address (less than three months old)
- A letter from the bank confirming the third party's bank details (less than three months old)

### Third party authorisation

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

Account holder  
signature

Date

## Would you like to change your 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 is known as your preferred fee fund.

Do you want to change your preferred fee fund? ☐ Yes ☐ No (If you do not want to change it, leave this section blank.)

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.
- 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  Surname   
ID/passport number  Designation   
Signature

## Financial adviser

Adviser 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](mailto:clientservice@psg.co.za)  
**Website:** [www.psg.co.za](http://www.psg.co.za)