

Section 14 fee revision form

- Use this form if the source funds of your PSG Wealth Retirement Annuity are the result of a Section 14 transfer from another provider. This form must be completed annually to confirm the ongoing fee we pay to your financial adviser in respect of your retirement annuity policy, or the ongoing advisory fee will be cancelled.
- Send the completed form, and any additional 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.

Investor details

Name and surname

ID/Passport number

Investment number

Adviser details

Name and surname

FSP name

FSP code

Financial adviser code

Agency code

Ongoing advisory fee authorisation

I agree to pay my financial adviser the following advisory fee on the investment listed in the Investor details section above.

☐

Keep the existing ongoing financial advisory fee

☐

Change the ongoing financial advisory fee to % (excl. VAT)

Fees

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
<input type="text"/>	<input type="text"/>



Signature

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.
- I authorise PSG to pay the fee to my financial adviser on my behalf.

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:

+27 (0) 860 774 774

Email:

clientservice@psg.co.za

Website:

www.psg.co.za