

## Securities external share transfer in form

- Use this form to transfer shares from another financial services provider to your PSG Securities Ltd share trading account.
- Send the completed form to [PSG.Wealth.Settlements@psg.co.za](mailto:PSG.Wealth.Settlements@psg.co.za).
- If you need assistance, please contact your financial adviser or a member of our settlements team on 011 996 5200 or at [PSG.Wealth.Settlements@psg.co.za](mailto:PSG.Wealth.Settlements@psg.co.za).

### Account holder details

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

### Where are you transferring shares from?

Name of financial services provider you want to transfer shares from	<input type="text"/>
Transferring account number	<input type="text"/>

### How must the shares be transferred?

- ☐ Full share transfer. Do not enter into any further investment transactions on my behalf. Cancel the above portfolio and transfer all scrip and cash in negotiable form, or
- ☐ Partial Share transfer

Please provide a copy of the most recent portfolio statement for this account with this form.

If you have selected 'Full share transfer', should the shares be transferred at base cost?

- ☐ Yes ☐ No

If you selected 'Partial Share transfer', please complete the table below.

### Confirmation of shares to be transferred

Complete the table below if you have selected to transfer specific shares or if you have selected a full transfer at a specified cost other than base cost.

Description of shares	Share code	Quantity	Cost price



## Is this transfer exempt from securities transfer tax?

If your transfer is subject to the exemption of Securities Transfer Tax, please select the applicable option below:

☐ Section 42    ☐ Section 44    ☐ Section 45    ☐ Section 47    ☐ Estate late

If your transfer is exempt from Securities Transfer Tax, you will need to provide supporting documents with this form.

- Section 42, 44, 45 or 47 Agreement signed by both parties
- Instruction from executor
- Letter of the executorship
- Power of attorney (if applicable)
- Death certificate
- Affidavit from receiving counterparty confirming whether Securities Transfer Tax exception applies.

## Confirmation of PSG Securities Ltd details

Transfer securities to:	
Entity name	PSG Securities Ltd
Bank clearing code	253455
Holding/Settlement bank account	ZA0000042565
Bank BIC	FIRNZAJJ896
Strate business partner ID	ZA100432
Broker BIC code	PSSYZAJJXXX

Transfer cash to:	
Bank name	First National Bank (FNB)
Account name	PSG Securities Ltd
Account number	62225356949
Branch code	255005

## Signatures

By signing this form, I confirm that:

- I have given PSG Securities Ltd accurate information.
- I understand that PSG Securities Ltd does not provide any financial advice.
- I understand that 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 Securities Ltd to receive and administer the shares.
- the shares are not subject to a cession, pledge or any other transfer
- I understand that the shares will only reflect on my statement once the transfer is complete.

## Account holder

Account holder signature

Date

If you are signing on behalf of the account holder, 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:** 011 996 5200

**Email:** [PSG.Wealth.Settlements@psg.co.za](mailto:PSG.Wealth.Settlements@psg.co.za)

**Website:** [www.psg.co.za](http://www.psg.co.za)