

Securities internal share transfer in form

- Use this form to transfer shares from one share trading account to another, where both the existing and the share trading account you wish to transfer to are held with PSG Securities Ltd.
- Send the completed form to 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.

Account holder details

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

Transfer details

Please complete the information of the person receiving the shares below. If the recipient is not the account holder, please complete all sections. If the receiving account and the transferring account are both held in the name of the account holder, you only need to confirm the receiving account number.

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

How must the shares be transferred?

- ☐ Full share transfer,
- ☐ Partial share transfer

- Transfers to a third party will result in a change in beneficial ownership and will trigger Securities Transfer Tax.
- Transfers between your own accounts will be done at base cost.
- Transfers to your spouse will be done at base cost.
- Transfers to a third party will be done at market value.
- Estate late transfers to your spouse will be done at base cost.
- All other estate late transfers will be done at market value as at date of death.

Confirmation of shares to be transferred

If you have selected 'Partial share transfer' above, please confirm the details of the transfer in the table below.

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.

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 (if applicable).
- 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

Website: www.psg.co.za