

- Use this form to switch between funds or if you want to rebalance your entire investment.
- For Retirement Funds where annuitised (non-vested) and non-annuitised (vested) benefits apply, please submit separate instructions for each contract.
- Send the completed form 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/Name of company or trust

ID/Passport number/registration number

Investment number

Switch or Rebalance instruction

Select the funds in which you would like to invest from the list of funds available [on our website](#). You can select a maximum of 10 funds to invest in. Please indicate your fund class clearly. If you do not indicate your fund class, we will default to the clean fee class of the particular fund that is available on our platform.

Your selection in the table below will replace the current fund allocation in your investment.

☐ Rebalance my entire investment to the destination funds indicated in the 'Destination fund' column below.

☐ Switch the funds listed in the 'Current fund' column to those listed in the 'Destination fund' column in the table below.

Cut-off time for transactional requests is **10h30** for that day. For Money Market Funds, the cut-off time is **08h30** for that day. Instructions received after cut-off will be processed on the following business day.

Current fund	Fund class	Percentage	Destination fund	Fund class	Percentage
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
		%			%
				Total	100 %

Change your existing recurring contribution fund allocation

Do you want to change your recurring contribution fund allocation? ☐ Yes ☐ No

If 'yes', please indicate how your recurring contribution must be invested:

☐ Same fund allocation as 'Destination funds' or

☐ Invest according to the funds and percentages in the table on the following page:

Fund name	Fund class	Percentage	
			%
			%
			%
			%
			%
	Total	100	%

Change your recurring withdrawal/annuity income paying funds

Do you want to change your recurring withdrawal or annuity income (if you are invested in a PSG Wealth Equity Linked Living Annuity) fund allocation? ☐ Yes ☐ No

If 'yes', please indicate how your recurring withdrawal or annuity income must be withdrawn:

- ☐ Same fund and percentage allocation as 'Destination funds' or
- ☐ Withdraw as per the fund and percentage allocation completed in the table below:

Fund name	Fund class	Percentage	
			%
			%
			%
			%
			%
	Total	100	%

Fees

You may choose to have your ongoing investment administration fee and financial adviser fee (where applicable) 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

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.

Investor

Investor signature

Date

If you are signing on behalf of the investor, please provide your details below.

Name	<input type="text"/>	Surname	<input type="text"/>
ID/passport number	<input type="text"/>	Designation	<input type="text"/>
Signature	<input type="text"/>		

Financial adviser

Adviser signature	<input type="text"/>	Date	<input type="text"/>
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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