



SWITCH / CHANGE INSTRUCTION FORM

SECTION A : INVESTOR DETAILS

Investment No.		Investor No.	
Investor Name			
Telephone (Home)		Telephone (Work)	
Telephone (Fax)		Telephone (Mobile)	
Email Address			

SECTION B : SWITCH DETAILS

SWITCH FROM DETAILS

Portfolio Name	Rand Switch	OR	Unit Switch
1.			
2.			

SWITCH TO DETAILS

Portfolio Name	Rand Switch	OR	Unit Switch
1.			
2.			

Special Instructions

SECTION C : CHANGE OF RECURRING DEBIT ORDER

The product minimum recurring debit order must be met of R5 000.

Load a new Debit Order YES NO

Change an Existing Debit Order YES NO

Cancel a Debit Order YES NO

Effective date of change **DD - MM - YYYY**

Portfolio Name	New Debit Order Amount (R)	Change Debit Order Portfolio to (specify new portfolio name)

SECTION D : CHANGE OF RECURRING WITHDRAWAL INSTRUCTION

How should the existing regular withdrawal instruction / s be treated after the switch :

- Regular withdrawal instruction to remain the same
- Cancel regular withdrawal instruction
- Start or change regular withdrawal payments

Please complete the table below. This automatically cancels the existing regular withdrawal instruction.

Portfolio Name	Amount per regular withdrawal (R)

Select a payment frequency :

Frequency	Monthly <input type="checkbox"/>	Quarterly <input type="checkbox"/>	Bi - Annually <input type="checkbox"/>	Annually <input type="checkbox"/>
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DECLARATION

I / We acknowledge that I / we are still bound by the terms, conditions and declarations agreed and signed to in the original application form.

Signed at (Place) _____

Date : **D D M M Y Y Y Y**

Investor's or Authorised Representative's Signature :