

Debit order

Unit Trust

Individuals and Legal Entities



This form will only be accepted when submitted with a completed and signed 'Client Details – Existing (Individual or Legal Entity) Investor' form' available from our Client Services Centre.

1. Investor details

Investor name

SA ID number / Passport number / Registration number

2. Start a new debit order

Please note:

- For your debit order to come into effect on the selected date, your debit order instruction must reach us no later than five business days before the selected date. If all requirements are not met, your debit order instruction will be processed on the selected date in the following month
- Debit order contributions can only be withdrawn 45 days after the investment date

Debit order amount

R

Commencement month

Collection date

1st

15th

20th

27th

Escalation rate per annum

5%

10%

15%

Other %

2.1 Investor bank account details

It is mandatory to complete this section.

Please note:

- Please provide the bank account funding this transaction
- If a third-party bank account is being used to fund this transaction, please provide a completed 'Third-party funding your investment' form available from our Client Services Centre

Name of account holder (as registered with bank)	<input type="text"/>		
Name of bank	<input type="text"/>		
Account number	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name of branch	<input type="text"/>	Code	<input type="text"/>
Account type	<input type="checkbox"/> Current	<input type="checkbox"/> Savings	Country <input type="text"/>

3. Change your existing debit order

Please note:

- For your debit order to come into effect on the selected date, your debit order instruction must reach us no later than five business days before the selected date. If all requirements are not met, your debit order instruction will be processed on the selected date in the following month
- Debit order contributions can only be withdrawn 45 days after the investment date
- If you wish to change the bank account details funding your debit order please complete a 'Change details – Add / Remove bank account' form available from our Client Services Centre

Unit Trust portfolio	Account number	Cancel	New debit order amount	Effective month (MMYYYY)	New collection date			
					1st	15th	20th	27th
		✓	R		✓ OR	✓ OR	✓ OR	✓
Total (R)			R					

Escalation rate per annum 5% 10% 15% Other %