Additional Investment

Endowment

Individuals

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

1. Investor details

Investor name

SA ID number / Passport number

2. Investment details

Investment amount

Total lump sum amount
(including phase-in, if applicable)

R

Phase-ins

Do you require your investment to be phased in   Yes   No

If 'Yes', please submit the relevant 'Phase-in' form available from our Client Services Centre.

If you elect to phase-in your investment, the investment amount will be invested into Nedgroup Investments Core Income Fund and phased in monthly over the selected period into the designated Unit Trust portfolio(s).

Impacted investment contract

Please note:

- Please indicate the existing investment contract(s) into which this additional investment must be processed
- The total additional investment amount cannot exceed an increase of 120% of the highest total contribution in any one of the previous two policy years
- Each amount will be invested proportionately into the unit trust portfolio specified in the 'Unit Trust portfolio' section

Investment contract number	Lump sum amount (excl phase-in)	Debit order amount
	R	R
Total (R)	R	R

Unit Trust portfolio

Please note:

- Income distributions will be reinvested (after tax if applicable)
- All features of your existing account will apply to the additional investment amount, including annual financial planning fees (if applicable)

Financial planning fees (if applicable)

- If no fees have been specified, 0% will apply
- If a fee is higher than the maximum is specified, the maximum will apply
- Initial fees in respect to debit orders will be deducted off each debit order amount before investing into the selected unit trust portfolio
- If you have nominated an account from which the annual fee is to be recovered, your selection will apply to your additional investment

Unit Trust portfolio	Existing account	New account	Lump sum percentage allocation	Debit order percentage allocation	Only applicable if investing with a Financial Planner		
					Initial fee (excl VAT)		**Annual fee** (excl VAT)
					Lump sum	Debit order	
	✓ or	✓	%	%	%	%	%
Total (must equal 100%)			%	%			

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3. Lump sum payment details

Please note:

- All lump sum payments must be paid into the following bank account via electronic funds transfer (EFT). Please use your SA ID number (or passport number if foreign national) as the reference
- We do not accept cash deposits
- We will only process your instruction once we have received proof of payment
- Interest will be earned (at the rate applicable to the below mentioned bank account) from the first day after the investment amount has been deposited until invested

Nedgroup Investments bank account details

Bank	Nedbank
Branch	BS Corporate
Account name	Nedgroup Structured Life Endowment Plan 1
Branch code	198765
Account number	1452042519

4. Debit order details

Please note:

- **Debit order escalation percentage cannot exceed 20%**
- 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 [M][M][Y][Y][Y][Y]

Collection date ☐ 1st ☐ 15th ☐ 20th ☐ 27th

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

5. 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

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Name of account holder (as registered with bank)

Name of bank

Account number

Name of branch   Code

Account type   Current   Savings   Country

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