

# Additional Investment

## Tax-Free Investment

Funded by a transfer from another service provider



### Individuals

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

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### 2. Tax-Free Investment notes

1. The Tax-free investment is only open to individuals and not legal entities.
2. Total contributions are limited to R46 000 per tax year (R500 000 over your lifetime) across all Tax-free investments, regardless of product provider, including monthly debit orders.
3. Should your total contributions exceed R46 000 per tax year, SARS will tax the over contributions at a flat rate of 40%. Please refer to the latest Investment Agreement for further clarity.
4. You can withdraw from your Tax-Free investment at any time and payments will only be made into the investor's bank account. No third-party payments are allowed.
5. Withdrawn amounts that are reinvested will be treated as additional contributions and therefore be subject to your annual contribution threshold of R46 000 as well as your lifetime R500 000 threshold.
6. Income distributions will be reinvested.

### 3. Receiving product provider

**Product provider name** Nedgroup Collective investments (RF) Proprietary Limited

**Registration number:** 1997/001569/07

**SARS reference number:** 9567186847

**Tax free savings account product name:** Nedgroup Investments Tax-Free Investment



## Unit Trust portfolio selection (for new portfolios)

**Please note:**

- Income distributions will be reinvested

**Financial planning fees (if applicable)**

- If no fees have been specified, 0% will apply
- If a fee higher than the maximum is specified, the maximum will apply

Unit Trust portfolio	Account number	Percentage allocation	Only applicable if investing with a Financial Planner
			Annual fee (excl VAT)
		%	%
<b>Total (Must equal 100%)</b>			

## 6. Payment details

**Please note:**

- We will only process your investment once we have received a completed transfer certificate and proof of payment from the transferring product provider
- 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

<b>Bank</b>	Nedbank
<b>Branch</b>	BS Corporate
<b>Branch code</b>	198765
<b>Account name</b>	Nedgroup Collective Investments Inflow Account
<b>Account number</b>	1452027900