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

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 R36 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 R36 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 Withdrawn amounts that are reinvested will be treated as additional contributions and therefore be subject to your annual contribution threshold of R36 000 as well as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

4. Transferring product provider details

Product provider name

Product name

Product type

☐ Full transfer ☐ Partial transfer

Contact person at transferring product provider

Contact number + (0)

Email address

5. Unit Trust portfolio selection

Unit Trust portfolio selection (for existing portfolios)

Please note:

- 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 higher than the maximum is specified, the maximum will apply

Unit Trust portfolio	Account number	Percentage allocation
		%
	Total (Must equal 100%)	

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

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

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

Bank	Nedbank
Branch	BS Corporate
Branch code	198765
Account name	Nedgroup Collective Investments Inflow Account
Account number	1452027900