

Additional Investment

Tax-Free Investment

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 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 Withdrawn amounts that are reinvested will be treated as additional contributions and therefore be subject to your annual contribution threshold of R36 000 as well as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. 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)
- If you have nominated an account from which the 'sale of unit' fee is to be recovered, your selection will apply to your additional investment

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
- Initial fees in respect to debit orders will be deducted off each debit order amount before investing into the selected unit trust portfolio

				Only applicable if investing with a Financial Planner	
Unit trust portfolio	Account number	Lump sum amount	Debit order amount	Initial fee (excl VAT)	
				Lump sum	Debit order
R			R	%	%
Total (R) - Total contributions are limited to R36 000 per tax year.		R	R		

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
- Initial fees in respect to debit orders will be deducted off each debit order amount before investing into the selected unit trust portfolio

			Only applicable if investing with a Financial Planner		
Unit trust portfolio	Lump sum amount	Debit order amount	Initial fee (excl VAT)		Annual fee (excl VAT)
			Lump sum	Debit order	
	R	R	%	%	%
Total (R) - Total contributions are limited to R36 000 per tax year.			R	R	

4. 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 Investments Collective Inflow Tax Free Investment
Branch code	198765
Account number	1452027900

5. Debit order details

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

M

M

Y

Y

Y

Y

Collection date1st15th20th27th

Escalation rate per annum5%10%15%Other %

6. 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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<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"/>						