

Transfer certificate

Tax-Free Investment

Individuals



1. Investor details

Investor name

SA ID / Passport number

2. Transferring product provider details

Product provider name

Nedgroup Collective investments (RF) Proprietary Limited

Registration number:

1997/001569/07

SARS reference number:

9567186847

Product name:

Nedgroup Investments Tax-Free Investment

Investor number

3. Receiving product provider

Product provider name

Registration number

SARS reference number

TaxFree Investment account number transferred to

4. Transfer details

☐ Full transfer

☐ Partial transfer

Value transferred R

Date of transfer

D

D

M

M

Y

Y

Y

Y

Unit Trust name	Value of transfer	No. of units transferred
Total (R)		

5. Contribution details

Please note:

If contribution amount is zero, please complete zero value.

Current tax year ending February

Contributions received for the current tax year

R

Total contributions received for the previous tax year(s)

R

6. Product provider declaration

On behalf of the Nedgroup Investments:

- The account transferred out was a Tax-Free Savings Account as defined in S12T of the Income Tax Act
- The above transfer request was processed in terms of the Regulations of Section 12T(8) of the Income Tax Act

Investor / Authorised
signature

Date

D	D	M	M	Y	Y	Y	Y
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Name

Capacity

Nedgroup Investments

Nedbank Clocktower Clocktower Precinct V&A Waterfront Cape Town 8001 PO Box 1510 Cape Town 8000 South Africa

Nedgroup Investments Proprietary Limited (Company registration number 1996/017075/07)

Incorporating Nedgroup Collective Investments (RF) Proprietary Limited (Company registration number 1997/001569/07)

Nedgroup Investment Advisors Proprietary Limited (Company registration number 1998/017581/07) an authorised Financial Services Provider (FSP licence number 1652)

Directors: I Ruggiero, NA Andrew, RC Williams

www.nedgroupinvestments.com