

# Initial Investment

## Notification of intent to transfer



### Individuals

The Nedgroup Investments Retirement Annuity, Pension Preservation and Provident Preservation Funds are administered by FNZ Financial Administration Solutions (Pty) Ltd. In this document references to “we”; “us”; “our” are references to the Fund and/or the administrator.

	FSCA Registration number:	SARS approval number:
Nedgroup Investments Retirement Annuity Fund	12/8/0037697	18/20/4/041932
Nedgroup Investments Pension Preservation Fund	12/8/0037698	18/20/4/041933
Nedgroup Investments Provident Preservation Fund	12/8/0037699	18/20/4/041931

### 1. Investor details

Investor name

SA ID number / Passport number

### I hereby indicate my intention to transfer as follows:

1. Transfer out of one of the Nedgroup Investments retirement funds ☐

Please complete the transferee funds paperwork and submit directly to the transferee fund administrator together with this form.

2. Transfer into one of the Nedgroup Investments retirement funds ☐

This form will only be accepted when submitted with:

- Clients onboarding for first time: 'Client Details - New to Nedgroup Investments Individual' form.
- Clients wishing to invest into a new product: 'Client Details - Existing Individual Investor' form
- 'Initial Investment - Retirement Annuity funded by a transfer' form

### Nedgroup Investments Retirement Fund bank account details:

Bank	Nedbank		
Branch	BS Corporate	Branch code	198765
Account name	Nedgroup Investments Retirement Annuity Fund	Account number	1452042489
Account name	Nedgroup Investments Pension Preservation Fund	Account number	1452042497
Account name	Nedgroup Investments Provident Preservation Fund	Account number	1452042470

## 2. Investor declaration

I confirm and certify that:

- I am responsible for my investment decisions and have considered whether this investment is right for my needs
- I confirm that all information provided in this application is true and correct and that I am not aware of any other information that may affect this application negatively
- I authorise Nedgroup Investments to accept this instruction as submitted (electronically or otherwise) and agree that Nedgroup Investments will not be held liable for acting on this application and/or any instructions contained herein
- The information contained in this form may be reported to the South African tax authorities

Investor / Authorised  
signature

Date

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Name

Capacity