

Opt into retirement two-pot system

Nedgroup Investments Provident Preservation Fund



Individuals

The Nedgroup Investments Provident Preservation Fund is 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 Provident Preservation Fund	12/8/0037699	18/20/4/041931

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. Retirement fund notes

The implementation of the two-pot retirement system effective 1 September 2024 has changed the South African retirement fund landscape. Your retirement savings up to 31 August 2024 were ringfenced into a vested component and the previous retirement fund rules will continue to apply to this component.

If you were a member of a Provident Preservation Fund on 1 March 2021 and 55 years of age or older, and are still a member of the same fund, you have the option to opt into the two-pot retirement system. We will then create a savings component for you along with seed capital.

The savings component will be seeded with an allocation of 10% of your total market value of your retirement savings, limited to R30 000.

I would like to opt in to the two-pot retirement system and receive seed capital in respect to:

☐ All of my investment contracts

Investment contract one

Investment contract two

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