



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. Switch details

- Please note:**
- You can only switch out of one unit trust portfolio at a time
 - If making a partial switch and the market value of the switch out unit trust portfolio falls below R2500 as a result of the switch, we will switch the entire balance to the selected switch to unit trust portfolio(s)
 - If you do not indicate how we should administer current recurring instructions:
 - Debit orders will continue

Unit Trust portfolio switching from

Unit trust portfolio	Account number	Switch out details		Debit order instruction		
				Continue	Cancel	Switch
		%	Rand amout	✓ OR	✓ OR	✓

Unit Trust portfolio(s) switching into

Unit Trust portfolio selection (for existing portfolios)

Please note:

- All features of your existing account will remain unchanged, including annual financial planning fees (if applicable)

				Only applicable if investing with a Financial Planner
Unit Trust portfolio	Account number	Switch in details		Initial fee (excl VAT)
		%	Rand amount	%
Total		%	R	

Unit Trust portfolio selection (for new portfolios)

Please note:

- All income distribution will be reinvested (after tax 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

			Only applicable if investing with a Financial Planner	
Unit Trust portfolio	Switch in details		Initial fee (excl VAT)	Annual fee (excl VAT)
			%	%
	%	Rand amount		
Total	%	R		