Withdrawal

Tax-Free Investment

Individuals

NEDGROUP INVESTMENTS

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. Tax-Free Investment notes

1. You can withdraw from your Tax-Free Investment at any time
2. Withdrawn amounts that are re-invested will be treated as additional contributions and therefore be subject to your annual contribution threshold of R36 00 as well as your lifetime R500 000 threshold

3. Withdrawal details

Please note:

- The value of the amount available to you may change between the date of completing this form and the date the withdrawal is processed
- If your withdrawal instruction decreases the market value of the unit trust portfolio selected to R2 500 of less and you don't have an active debit order, we will pay out the entire balance
- If requesting a 100% withdrawal you will receive the cleared amount – the remainder will be paid out after the relevant clearance period
- If you are making a 100% withdrawal from a unit trust portfolio that pays an annual financial planning fee via the sale of units, any accrued fee will be paid to the financial planner before the withdrawal is processed
- Withdrawals are payable into the bank account specified in the 'Investor bank account detail' section, within two business days of processing your instruction. The funds may take an additional two days to reflect in your bank account
- If you do not indicate how we should administer current recurring instructions existing debit orders will continue

Full withdrawal

Is this a full withdrawal across all unit trust portfolios? ☐ Yes ☐ No

If 'Yes', would you like to cancel all debit orders? ☐ Yes ☐ No

Partial withdrawal

If you require a partial withdrawal, please complete the table below.

		Please select EITHER a withdrawal percentage OR a rand amount		Debit order	
Unit Trust portfolio	Account number	Percentage	Rand amount	Continue	Cancel
		%	R	✓	OR ✓
	Total	%	R		

4. Investor bank account details

It is mandatory to complete this section.

Please note:

- No third-party payments will be processed
- Payments will be delayed if the name of the account holder as registered with the bank is different from that completed below
- If the bank account specified below is new, you will be required to authorise this instruction by responding to an SMS that Nedgroup Investments will send you

Name of account holder (as registered with bank)

Name of bank

Account number

Name of branch Code

Account type ☐ Current ☐ Savings Country