

Notification of death

Unit Trust and Tax-Free Investment



1. What you need to know

1. Please reference the ‘Guide to submitting a death claim’ process and checklist for the supporting documents required to be submitted together with this form. Please email this form together with all required supporting documents to estates@nedgroupinvestments.co.za.
2. Nedgroup Investments will take instruction from the executor or person appointed to deal with the deceased’s estate.
3. Withdrawals will only be paid into the estate late bank account.
4. If you have any questions, please contact our Client Services Centre on 0800 123 263 (from within SA) or on +27 21 412 2003 (from outside SA).

2. Details of executor or authorised person

Title and surname		
First names		
ID number / Passport number		
Cell phone number (mandatory)	+ (0)	
Alternative contact number	+ (0)	
Email address (mandatory)		
Residential address		
	Code	
	Country	South Africa
	If other	

3. Details of deceased investor

Investor name	
Investor ID number	
Investor number	
Does the deceased have a will?	☐ Yes ☐ No

If ‘Yes’, please submit a copy of the will.

4. Declaration and signature

I confirm and certify that:

- The information I have completed in this form is to the best of my knowledge true and correct
- I understand that further information may be requested, and that the information provided may be corroborated with third parties
- Nedgroup Investments shall rely on the consent exceptions, as provided for in POPIA, to process the personal information of any other persons named or identified in this form, where this is necessary for the purpose

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Full 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: NA Andrew, RC Williams

www.nedgroupinvestments.com