

# Switching Form

Investor code:



Collective Investments

## Personal particulars

Title:  Mr  Mrs  Miss  Other:

Surname: \_\_\_\_\_ Full names: \_\_\_\_\_

Postal address: \_\_\_\_\_ Postal code: \_\_\_\_\_

Identity number:                    (compulsory) Date of birth:

Tel. no: (\_\_\_\_\_) \_\_\_\_\_ (W) (\_\_\_\_\_) \_\_\_\_\_ (H)

Fax no: (\_\_\_\_\_) \_\_\_\_\_ Cell no: \_\_\_\_\_

E-mail address: \_\_\_\_\_

## Switching particulars

**FROM:**

Present Unit Trust	All units	or	Amount	or	Number of units
<input type="text"/>	<input type="text"/>	or	<input type="text"/>	or	<input type="text"/>
<input type="text"/>	<input type="text"/>	or	<input type="text"/>	or	<input type="text"/>
<input type="text"/>	<input type="text"/>	or	<input type="text"/>	or	<input type="text"/>

**TO:**

New Unit Trust	Income		Debit order instructions:
	Reinvested	Paid Out	
<input type="text"/>	% <input type="text"/>	(✓) <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> Transfer the existing monthly payments as well.
<input type="text"/>	% <input type="text"/>	(✓) <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> Cancel the existing debit order.
<input type="text"/>	% <input type="text"/>	(✓) <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> Increase the existing debit order to R _____

If income choice is not indicated, it will be reinvested.  
In the case of income, being paid out, deposit monies into the following bank account:

Bank: \_\_\_\_\_ Branch: \_\_\_\_\_

6-digit branch code:   -   -   Account no: \_\_\_\_\_

Type of account (eg cheque/savings): \_\_\_\_\_

Name of account holder: \_\_\_\_\_  
(The accuracy of this information will expedite payment.)

Name of intermediary: \_\_\_\_\_ Code:

## Important notes

1. Original unit certificate(s) must be attached for cancellation.
  2. Should the certificate(s) have been mislaid, the prescribed indemnity from (TAE10) must be completed and stamped with a R2,00 revenue stamp.
  3. No initial charge is payable when switching between equity funds. When switching from interest funds to equity funds, the difference in the initial charge is payable. If no initial charge is payable, a switching fee of 5% of the value to a maximum of R25,00 is payable.
  4. Companies, pension funds, clubs, societies, etc. must attach the necessary extract from the minutes, as well as the signatures of the authorised signatories.
  5. In terms of the Financial Intelligence Centre Act we cannot process the transaction without the required identification and verification documentation. Please enclose the necessary documents if you are not already FICA compliant.
- Advice: If you have received advice from a Sanlam adviser, please ask him/her to complete the following details:  
**DETAILS OF YOUR SANLAM ADVISER**  
Initials and surname: \_\_\_\_\_ Adviser code: \_\_\_\_\_ Telephone number: \_\_\_\_\_
- Important: If a Sanlam adviser has provided advice, it is the adviser's responsibility to complete the advice documentation for this transaction and forward it together with this application to Sanlam Collective Investments.

## Declaration

I warrant that I have the power and authority and am legally competent to enter into and conclude this transaction with the necessary assistance where such assistance is a legal requirement.

\_\_\_\_\_  
Signature of investor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Assisted by (if applicable)

\_\_\_\_\_  
Relationship