

Additional Contribution: Transfer

1Life Market Linked Living Annuity



Wealthport (Pty) Ltd (2012/025878/07)

Wealthport (Pty) Ltd ("Wealthport") is an Authorised Financial Services Provider (FSP No. 44158)

Ballyoaks Office Park, 35 Ballyclare Drive, Bryanston Johannesburg • Postal address: Postnet Suite 451, Private Bag X51, Bryanston, 2021

Contact number: 010 593 3103 • Facsimile: 087 231 6972 • Email: admin@wealthport.co.za

Important Information:

- Please read the latest Terms and Conditions applicable to this investment. This is available from your Financial Advisor, the Client Services Centre at 010 593 3103 or at www.wealthport.co.za
- Please submit applications for processing to admin@wealthport.co.za or fax to 087 231 6972.

1. Member details

First name:

Surname:

ID number:

Email address:

Cell phone number:

Portfolio number:

Portfolio name:

2. Investment details

Transferring fund details:

Retirement Annuity Pension Fund Provident Fund Existing Living Annuity

Estimated amount to be transferred: R

Registered fund name:

Fund registration number:

Member account number:

Contact person: Tel number:

Fund Selection:

Fund name	Fund class	Once off investment split %
		%
		%
		%
		%
	TOTAL	100%

ETF Investments:

If an Exchange Traded Fund ('ETF') forms part of your investment selection you are required to allocate a portion of your investment selection to a money market fund for the purpose of deducting ongoing administration fees. Currently the default money market fund is the Prescient Money Market Fund. The fee portion of your portfolio will be topped-up as and when required by means of selling units proportionally across your portfolio. Please indicate a percentage to allocate to the Prescient Money Market Fund in the investment split table below

3. Bank Account details for collection

Please attach a cancelled cheque or recent bank statement for the bank account specified, as proof of banking details.

Bank:

Branch:

Branch code:

Account holder:

Account number:

Account type: Current Savings Transmission

4. Financial Advisor details

If you have appointed a Financial Advisor, please indicate the initial Financial Advisor fee* which must apply to the investment.

Initial fee as currently loaded for the portfolio Fee as specified below:

Initial fee (excl. VAT): % (Maximum fee: 3%)

**Initial fees are not applicable to Section 37 transfers.*

5. Member declaration

- I have read, understand and agree to the latest Terms and Conditions AND latest Conditions of Membership governing this agreement, as published on the Wealthport website.
- I confirm that all information provided herein is true and correct and I will advise Wealthport in writing should any of the details change subsequent to signature hereof.
- I confirm that Wealthport may accept all instructions signed by me, including instructions submitted via electronic means.
- I confirm that the Financial Advisor signature below is that of my appointed Financial Advisor.
- I hereby declare that I am the legal owner of the funds and/or investments which are to be utilised to facilitate this investment or have gained the signed permission of the third-party bank account holder as included in this application.
- I understand that this application will only be finalised once Wealthport has received and verified all required documentation.

Member signature:

Date: / /

Financial Advisor signature:

Date: / /

6. 1Life Market Linked Living Annuity

Account holder	1Life Insurance (RF) Ltd
Bank	RMB Corporate Banking
Branch	Johannesburg
Branch code	255 005
Account number	625 9244 3776
Account type	Current Account