

# Model Portfolio Rebalance Instruction



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

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

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## Important Information:

- Please read the latest Terms and Conditions applicable to this investment. This is available from the Client Services Centre at 010 593 3103 or at [www.wealthport.co.za](http://www.wealthport.co.za)
- Please submit applications for processing to [admin@wealthport.co.za](mailto:admin@wealthport.co.za) or fax to 087 231 6972.

## 1. Model portfolio details

Please specify the model portfolio you wish to rebalance:

Model Portfolio name:

Portfolio manager name and surname:

FSP license number:

## 2. Rebalance details

Please specify the new portfolio allocation in the table below.

Wealthport will rebalance each investment portfolio to this specified allocation by buying and selling the required units.

Fund name	Fund class	Percentage
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		100%

### Please note:

- A rebalance request cannot be processed on a portfolio for which there is a transaction in progress, a portfolio that is inactive or where there are no available units. Wealthport will automatically exclude any such portfolio from the rebalance.
- A Category II Financial Services Providers License for all instruments which are purchased, sold or switched on behalf of clients is required in conjunction with the appropriate client mandate in order for Wealthport to process the rebalance instruction.

## 3. Model portfolio manager declaration

- I confirm that I have read and understand the latest Terms and Conditions 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 hereby confirm that I am appropriately licensed with the Financial Services Board directly in terms of the Financial Advisory and Intermediary Services Act, No 37 of 2002 ("FAIS Act") for the products and product sub-categories offered to clients via the Wealthport platform.

Model portfolio manager signature:

Date:     /   /