Unit Transfer Form

Discretionary Investment

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.
- **Please note that Wealthport does not have the authority to cancel your existing debit orders. Please inform the current administrator of these investments directly if you wish to cancel your debit order.**

1. Investor details

First name:

Surname / Legal Entity name:

ID / Registration number:

Contact number:

Email address:

Existing portfolio number to transfer INTO:

2. Units to be transferred

Please attach a copy of your current statement reflecting the below mentioned investments to be transferred.

Fund name to be transferred	Fund class	Reference/account number	Percentage/units to be transferred
		TOTAL	

3. Investor declaration

- I hereby authorise Wealthport to receive the above-mentioned units and furthermore do whatever is required to give effect to this transfer instruction.
- I understand that the units will only be reflected on my Wealthport statement when the transfer has been completed.
- I hereby confirm that the units to be transferred are not ceded or pledged or assigned in any way.
- I have read, understand and agree to 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 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 transaction.
- I understand that this application will only be finalised once Wealthport has received and verified all required documentation.

Investor signature: Date: Y Y Y Y / M M / D D

Financial Advisor signature: Date: Y Y Y Y / M M / D D