Regular Withdrawal

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 select which of the following actions you wish to request:

☐ Start a new regular withdrawal ☐ Amend my existing regular withdrawal ☐ Cancel my regular withdrawal

1. Client details

First name:

Surname / Legal entity name:

ID / Registration number:

Email address:

Portfolio number:

Portfolio name:

2. Regular withdrawal details

Fund Name	Fund class	Amount	% of fund
		R	%
		R	%
		R	%
		R	%
	TOTAL	**R**	**100%**

Please note:

- When there is an insufficient balance remaining in a fund from which a Regular Withdrawal is scheduled to take place, Wealthport will contact the Client or his/her appointed Financial Advisor so that the selected fund can be replenished or the Regular Withdrawal instruction adjusted.
- There is a 30 (thirty) day holding period on all investment amounts received via deposit or debit collection, which means that these investment amounts may not be withdrawn within this period.

Regular withdrawal payment details:

Payment date: Y Y Y Y / M M / D D

Frequency: ☐ Monthly ☐ Quarterly ☐ Half Yearly ☐ Yearly

Please note that the payment date is the date on which you would like to receive the income in your bank account. Wealthport cannot guarantee payments on specific dates, but we will endeavour to pay the proceeds from the regular withdrawal as close to the selected date as possible.

All payments are made electronically to the bank account of the Client only. Payments to third party bank accounts are not permitted.

3. Bank Account Details

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. Client declaration

- 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.

Client signature: Date: Y Y Y Y / M M / D D

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