Switch Instruction

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

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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. Client details

First name:

Surname / Legal entity name:

ID / Registration number:

Email address:

Portfolio number:

Portfolio name:

2. Switch method

☐ Fund switch (please complete sections 3 and 5 – 8)

☐ Portfolio rebalance (please complete sections 4 – 8)

3. Fund switch details

Switch OUT the following funds

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

Switch INTO the following funds

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

4. Portfolio rebalance details

Please specify the new portfolio allocation in the table below.
Wealthport will rebalance your portfolio to this specified allocation by buying and selling the required units.

Fund name	Fund class	Percentage
		%
		%
		%
		%
		%
		%
		%
	TOTAL	**100%**

Please note: If there is an existing transaction in progress on the portfolio, then the rebalance instruction will only be processed once the transaction is complete.

5. Debit order details

☐ Keep current fund selection details for debit order UNCHANGED.

OR

☐ Change fund selection details for debit order to the below new fund selection (please complete the below):

Fund name	Fund class	Investment split %
		%
		%
		%
		%
		%
		%
		%
	TOTAL	**100%**

Please note: All other information relating to your debit order (i.e. investment amount, collection date, etc.) will remain unchanged.

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6. Regular withdrawal details

☐ Keep current fund selection details for regular withdrawal UNCHANGED.

OR

☐ Change fund selection details for regular withdrawal to the below new fund selection (please complete the below):

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

Please note:

- **All other information relating to your regular withdrawal (i.e. amount, payment date, etc.) will remain unchanged.**
- 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.

7. 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 / Member signature: ____________ Date: Y Y Y Y / M M / D D

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