Withdrawal Instruction

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

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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.

Please select which of the following actions you wish to request:

☐ Partial withdrawal ☐ Full withdrawal ☐ Amended recurring withdrawal ☐ Transfer to another administrator

1. Client details

First name:

Surname / Legal entity name:

ID / Registration number:

Email address:

Portfolio number:

Portfolio name:

2. Withdrawal details

Please complete the following section if you are requesting a partial withdrawal, transfer to another administrator or a change in your current recurring withdrawal.

Partial withdrawal amount: **R**

Fund Name	Fund class	Amount	% of fund
		R	%
		R	%
		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all investment amounts received via deposit or debit collection, which means that these investment amounts may not be withdrawn within this period.
- An instruction to withdraw a rand amount in excess of the equivalent of 95% of the available balance of the fund will not be processed. The client may instead elect to withdraw 100% of the fund, or alternatively must specify a percentage withdrawal or must specify a rand amount withdrawal of less than the equivalent of 95% of the available balance of the fund.

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:

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Branch code:

Account holder:

Account number:

Account type: ☐ Current ☐ Savings ☐ Transmission

4. Debit order details (if applicable)

☐ Cancel my debit order

☐ 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.

5. 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