FundiSA Beneficiary Change Form

What you need to know

1. Before completing this form, please read the Nedgroup Investments FundiSA brochure and FundiSA Frequently Asked Questions document. These can be obtained from our website (www.nedgroupinvestments.co.za) by clicking on 'Invest with us' and then following the steps from there.

2. The FundiSA Fund is only available to investors who are saving on behalf of beneficiaries who:
   - have a household income of less than R180 000 per year;
   - are under 35 years of age; and
   - are SA nationals or permanent residents.

   Please refer to the Nedgroup Investments FundiSA brochure for more information.

3. Beneficiaries may only be changed once per calendar year.

4. If completing this form by hand, please complete all relevant information legibly to avoid processing delays. Note that information filled in outside of the relevant fields will not be considered when processing your instruction.

5. Return the completed and signed form with the relevant supporting documents to us via:
   - Email to **nedgroupinvestments@silica.net**
     Please print and sign the form before scanning and emailing it to us, as an authorised signature is required for processing; or
   - Fax to **0861 119 733**.

6. We will process your instruction once we have received:
   - A completed and signed form; and
   - All relevant supporting documents.

7. The daily cut-off for receipt of instructions is 14:00.

8. If you have any questions about this form please contact our Client Service Centre on **0860 123 263**.

Supporting document checklist

Beneficiary

☐ Copy of each new beneficiary's South African ID or South African birth certificate.

1. Investor details

FundiSA Investor number

Title and surname

Initials and first names

SA ID number

Please note:
If you wish to change any of your personal details, please complete and submit a Personal Details Change Form, available from our website at www.nedgroupinvestments.co.za or your financial planner (if applicable).

2. Beneficiary details

2.1 Remove a beneficiary

Please complete the names of any current beneficiary(ies) that are to be removed:

Title and surname

Initials and first names

SA ID number

End debit order? Yes No

Title and surname

Initials and first names

SA ID number

End debit order? Yes No

2.2 Add a new beneficiary

Please note:

- The beneficiary's household income refers to the combined income of the parents / guardians of the beneficiary.
- **If the beneficiary's household income is more than R180 000 per year, they are not eligible for the FundiSA Fund.**
- If you would like to add more than two new beneficiaries, please attach a separate copy of Section 2.2: 'Add a new beneficiary', completed and signed by the investor.
- For multiple beneficiaries, percentages allocated must total 100% (no decimal points). Please remember to allocate percentages according to the final number of beneficiaries after this Beneficiary Change Form has been completed.

Please complete the new beneficiary's details below:

Title and surname

Initials and first names

SA ID number

Date of birth D D M M Y Y Y Y

Investor's relationship to beneficiary

Percentage of contribution to be allocated to this beneficiary %

NEDGROUP INVESTMENTS

2.3 Second new beneficiary

Please complete the new beneficiary's details below:

Title and surname

Initials and first names

SA ID number

Date of birth D D M M Y Y Y Y

Investor's relationship to beneficiary

Percentage of contribution to be allocated to this beneficiary %

3. Correspondence about your FundiSA investment

3.1 Transaction confirmations

All transactions will be communicated via sms to the cell number provided. Should your number change, please send us the new cell number and a signed copy of your ID via email to nedgroupinvestments@silica.net or fax to 0861 119 733.

3.2 Online access to your investment

Information regarding your investment may also be accessed from our secure site. Once you have received your FundiSA investor number, you may register on the Nedgroup Investments website. To access the site, go to **www.nedgroupinvestments.co.za** and click on 'Register' in the top right hand corner of the landing page.

Please note that we will need to have a valid cell phone number and email address on record in order for you to register successfully.

4. Banker details (if applicable)

Name of banker

Employee number

Name of branch

Branch code

Branch stamp

Telephone (work) + (0)

Fax + (0)

Signature of banker

Date D D M M Y Y Y Y

5. Nedbank Financial Planner details (if applicable)

Financial Planner

Financial Planner Code

Authorised Signature

Date D D M M Y Y Y Y

6. Investor declaration

I confirm that:

- I am responsible for my investment decisions and have considered whether this instruction is right for my needs.
- I understand and agree to the information in the Nedgroup Investments FundiSA brochure and the Frequently Asked Questions document that pertains to FundiSA.
- I am aware that FundiSA grants are reserved strictly for the tertiary education of students from households earning less than R180 000 per year.
- I did not receive advice from Nedgroup Investments about this instruction.
- All of the instructions and documents provided by me or on my behalf about this instruction, whether in my handwriting or not, are accurate and complete.
- Nedgroup Investments may accept signed instructions by fax or email and will not be responsible for any failure or delay of any networks, electronic or mechanical device or any other forms of communication used for submitting and processing my instructions.
- I am aware that Nedgroup Investments may share my personal information within the Nedbank Group, with the National Student Financial Aid Scheme (NSFAS) or where required by law or contractual agreement.
- Nedgroup Investments may only accept instructions from any authorised third party if I appoint them and authorise this in writing.
- I will have access to my investment details via Nedgroup Investments' secure online website if registered for this access.
- I am aware that Nedgroup Investments may close my investment account if my investment value is less than R40 from the date of investment.
- I am aware that I need to inform Nedgroup Investments if any of my details change.

Authorised signatory

Date D D M M Y Y Y Y