

# INVESTOR ONLINE REGISTRATION

## NOMINATED USERS

Foord Unit Trusts (RF) (Pty) Ltd



### HOW TO REGISTER FOR INVESTOR ONLINE

1. Register to use the Investor Online facility by completing this form using BLOCK LETTERS.
2. We will send the nominated user(s) an email with login details when registration is complete.
3. If you require any assistance in completing this instruction or activating the online registration, please call us on 021 532 6969.

### A. ABOUT FOORD INVESTOR ONLINE

1. Through the Foord Investor Online facility, nominated users can view investor details and issue instructions to Foord.
2. Use of Investor Online is subject to the terms and conditions of use. Investor Online may not be used for any unlawful activity.
3. Only nominated users may access and use Investor Online for the investor, which has mandated the user to access and manage the investment account. Foord shall be entitled to grant, update and terminate a nominated user's web portal privileges.
4. It is your responsibility to monitor the use of Investor Online by your nominated user(s) and to instruct Foord immediately to revoke Investor Online access of a user who is no longer mandated to act for the investor. Foord Unit Trusts will not be liable for any losses as a result of the investor's and the nominated user's use of Investor Online.
5. **VIEW ONLY ACCESS: With view only access, a nominated user can only view latest portfolio values and investment statements and tax certificates.**
6. **FULL ACCESS: With full access, a nominated user can also invest, switch and redeem units and amend investor details. Foord Investor Online does not currently offer a dual authorisation facility. Any nominated user with full access can issue instructions to Foord.**

### B. INVESTOR DETAILS

Investor number \_\_\_\_\_ Registered name \_\_\_\_\_

### C. NOMINATED USER DETAILS

Title \_\_\_\_\_ First name(s) \_\_\_\_\_ Surname \_\_\_\_\_

SA identity number \_\_\_\_\_ Nationality \_\_\_\_\_

Additional nationality(ies) \_\_\_\_\_ Foreign passport number(s) \_\_\_\_\_

Date of birth \_\_\_\_\_ Country of birth \_\_\_\_\_

Occupation \_\_\_\_\_ Relationship to the entity \_\_\_\_\_

Residential address \_\_\_\_\_

Post code \_\_\_\_\_

Cell ( \_\_\_\_\_ ) \_\_\_\_\_ Email \_\_\_\_\_

Is the person an Authorised Signatory? (Y/N) \_\_\_\_\_ Specimen signature \_\_\_\_\_

Online access requested:  View only  Full access, including invest, switch & redeem

## D. ADDITIONAL NOMINATED USER DETAILS

Title \_\_\_\_\_ First name(s) \_\_\_\_\_ Surname \_\_\_\_\_  
SA identity number \_\_\_\_\_ Nationality \_\_\_\_\_  
Additional nationality(ies) \_\_\_\_\_ Foreign passport number(s) \_\_\_\_\_  
Date of birth \_\_\_\_\_ Country of birth \_\_\_\_\_  
Occupation \_\_\_\_\_ Relationship to the entity \_\_\_\_\_  
Residential address \_\_\_\_\_  
\_\_\_\_\_ Post code \_\_\_\_\_  
Cell ( \_\_\_\_\_ ) \_\_\_\_\_ Email \_\_\_\_\_  
Is the person an Authorised Signatory? (Y/N) \_\_\_\_\_ Specimen signature \_\_\_\_\_

Online access requested:

View only

Full access, including invest, switch & redeem

## E. INVESTOR DECLARATION

All information in this application form and in all documents that have been or will be signed by me in connection with this investment, whether in my handwriting or not, is accurate and complete and forms the basis of this agreement. I will notify Foord promptly of any changes to the information provided.

I warrant that I have full power and authority to enter into and conclude this contract, with the necessary assistance where such assistance is a legal requirement.

I authorise Foord to: Provide access to Foord's Investor online web portal to the person(s) named in this instruction and hereby waive any claim that I may have against Foord and indemnify Foord against any loss incurred as a result of Foord receiving and/or acting upon such instruction.

Signature \_\_\_\_\_ Name \_\_\_\_\_

Capacity \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Name \_\_\_\_\_

Capacity \_\_\_\_\_ Date \_\_\_\_\_