

TAX FREE INVESTMENT ACCOUNT TRANSFER FORM

Foord Unit Trusts (RF) (Pty) Ltd



HOW TO TRANSFER YOUR TAX FREE INVESTMENT TO FOORD

1. This form should be used to request a **transfer of your tax free investment to Foord Unit Trusts** from another tax free investment product provider in terms of S12T(8) of the Income Tax Act.
2. Complete the relevant sections in full using BLOCK LETTERS. If you require any assistance in completing this form, please call us on 021 532 6969.
3. Please fax (021 532 6970) or email (unittrusts@foord.co.za) this transfer form, together with the completed Tax Free Investment Account Form and all required supporting documentation to Foord Unit Trusts (RF) (Pty) Ltd (Foord). These documents should then be mailed to Foord at PO Box 135, Howard Place, 7450.
4. Instructions will only be processed once all required documentation and confirmation from the transferring product provider have been received.
5. Foord reserves the right to decline the transfer request.

SECTION A (COMPLETED BY THE INVESTOR)

INVESTOR DETAILS

Title _____ First name(s) _____ Surname _____

SA identity number _____ Investor number* _____

* Please quote your Foord tax free investment account number.

Tax reference number _____ Country of tax registration _____

PERSON ACTING ON BEHALF OF THE INVESTOR

Guardian or person acting on behalf of the investor under Power of Attorney. Please provide proof of this authority (such as birth certificate of minor child)

Title _____ First name(s) _____ Surname _____

SA identity number _____ Foreign passport number _____

Relationship to investor _____

TAX FREE INVESTMENT TRANSFERRED FROM

Product provider name _____

Tax free investment product name _____

Tax free investment account number to be transferred from _____

Estimated value of transfer R _____

Contact person at transferring product provider _____

Contact person email _____ Contact person telephone _____

Transfer type Rand value

PARTIAL TRANSFER

If partial transfer is selected, please specify the amount to be transferred (minimum R10,000.00):

UNIT TRUST PORTFOLIO/EXCHANGE TRADED FUND TO BE TRANSFERRED FROM	RAND AMOUNT OR PERCENTAGE OR	NUMBER OF UNITS
	R	%
	R	%
	R	%

NOTES: • Please confirm that the transfer complies with limits (minimum or maximum) set by the transferring product provider.

INVESTOR DECLARATION

I hereby request that the abovementioned tax free investment be transferred to the Foord Unit Trusts tax free investment provided by Foord Unit Trusts (RF) (Pty) Ltd as detailed in section B.

I confirm that all the information provided by me is true, complete and correct.

TAX FREE INVESTMENT ACCOUNT FORM

TRANSFER REQUEST

FOORD UNIT TRUSTS (RF) (PTY) LTD



I authorise Foord to accept instructions by facsimile or email 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 facsimile or email.

Signature _____ Name _____

Date _____

SECTION B (COMPLETED BY THE RECEIVING PRODUCT PROVIDER: FOORD UNIT TRUSTS)

FOORD UNIT TRUSTS (RF) (PTY) LTD DETAILS

Registered name	Foord Unit Trusts (RF) (Pty) Ltd		
Registration number	2001/029793/07		
Tax reference number	9589/209/14/8		
Telephone	+27 21 532 6969		
Fax	+27 21 532 6970		
Email	unittrusts@foord.co.za		
Physical address	8 Forest Mews c/o Forest Drive & Lonsdale Way Pinelands 7405 South Africa	Postal address	PO Box 135 Howard Place 7450 South Africa

Reference number for transfer _____

RAND TRANSFER

ACCOUNT NAME	ACCOUNT NUMBER	BANK NAME	BRANCH NAME	BRANCH CODE
FOORD UNIT TRUSTS (RF) (PTY) LTD	6204 4711 366	FIRST NATIONAL BANK	REMOTE BANKING SERVICES	25-06-55

Reference number for payment _____

RECEIVING PROVIDER CONFIRMATION

We will accept the above tax free investment transfer and confirm that:

- The above transfer will be processed in terms of the Regulations published in terms of Section 12T(8) of the Income Tax Act
- The account into which the investment will be transferred is a tax free investment as defined in Section 12T of the Income Tax Act.

Name _____ Capacity: INVESTOR RELATIONSHIP MANAGER,
ON BEHALF OF FOORD UNIT TRUSTS (RF) (PTY) LTD

Signature _____ Date _____