



HOW TO TRANSFER YOUR TAX FREE INVESTMENT FROM FOORD

- 1. This form may be used to request a **transfer of your tax free investment from Foord Unit Trusts to another tax free investment product provider** in terms of S12T(8) of the Income Tax Act.
- 2. Complete the relevant sections in full. If you require any assistance in completing this form, please call us on 021 532 6969.
- 3. **Complete the application process of the receiving product provider.** Please ensure that the receiving provider is able to accommodate transfer requests.
- 4. Foord will issue you with a transfer certificate after completion of the withdrawal instruction. Please retain your certificate for tax record keeping purposes.
- 5. Foord may limit investors to a maximum of 2 transfers out during any tax year (March to February). Partial transfers are not permitted. No transfer request will be accepted during the last 10 business days of February. Please allow up to 10 days for transfers.

SECTION A (COMPLETED BY THE INVESTOR)

INVESTOR DETAILS

Title _____ First name(s) _____ Surname _____

SA identity number _____ Foreign passport 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 Foord Unit Trusts (RF) (Pty) Ltd

Tax free investment product name Foord Flex Income B4 ☐ Foord Equity Fund B4 ☐

Foord Balanced Fund B4 ☐ Foord Flexible Fund of Funds B4 ☐

Tax free investment account number to be transferred from (Foord tax free investment account number) _____

Estimated value of transfer R _____

Foord Unit Trusts email Unittrusts@foord.co.za Foord Unit Trusts telephone 021 532 6969

Transfer type ☐ Rand value ☐ Units

INVESTOR DECLARATION

I hereby request that the Foord Unit Trusts tax free investment detailed in section A be transferred to the Product Provider and Product detailed in section B.

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

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 _____

TAX FREE INVESTMENT ACCOUNT FORM**TRANSFER REQUEST****FOORD UNIT TRUSTS (RF) (PTY) LTD****SECTION B** (COMPLETED BY THE RECEIVING PRODUCT PROVIDER)**RECEIVING PRODUCT PROVIDER DETAILS**

Registered name _____

Registration number _____

Tax reference number _____

Telephone _____ Email _____

RECEIVING TAX FREE ACCOUNT DETAILS

Tax free product name _____ Tax free product account number _____

Reference number for transfer _____

RAND TRANSFER

BANK ACCOUNT NAME	ACCOUNT NUMBER	BANK NAME	BRANCH NAME	BRANCH CODE

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 _____

Signature _____ Date _____