STANLIB Wealth Management Limited Registration number 1996/005412/06
Authorised Administrative FSP in terms of the FAIS Act, 2002 (FSP No. 26/10/590)
17 Melrose Boulevard Melrose Arch 2196 P O Box 202 Melrose Arch 2076
Contact Centre 0860.123.003 Facsimile 0867.277.505 or 011.448.6666
E-mail instructions@stanlib.com

STANLIB

Additional Investments

Classic Range

Please note: A **copy** of this form **must** be sent to **STANLIB** and the **Intermediary** must also retain a complete copy of the application. In terms of the **FAIS Act**, the financial services provider that dealt with the client must deliver the original to the **CLIENT** for safe custody.

Investment number

Product name (please tick) ☐ Classic Investment Plan ☐ Classic Retirement Annuity

Client's details

First name

Surname

Identity

Date of birth D D - M M - C C Y Y

Investment details

Please note: There is a minimum ad-hoc amount of R10 000.

Investment amount R .

Payment type ☐ Bank deposit (M65) ☐ Once-off debit

If once-off debit, please complete the following: *(Please note a maximum of R500 000 may be debited from a clientís bank account.)*

Banking details for once-off debit

Bank

Branch

Account number

Branch code

Account type ☐ Cheque account ☐ Transmission account ☐ Savings account

Account holder's name

Signature of account holder

Portfolio selection

A maximum of 8 portfolios is allowed after the additional investment. Where the portfolio range is not selected or left blank, the Select portfolio range will apply. If the portfolio selected is not offered on the Select portfolio range, then the Classic portfolio range will apply. *For a complete list of the portfolios, please visit www.stanlib.com.*

Portfolio name	Portfolio Range (e.g. Classic, Select)	Percentage	Amount
1.	1.	%	R
2.	2.	%	R
3.	3.	%	R
4.	4.	%	R
5.	5.	%	R
6.	6.	%	R
7.	7.	%	R
8.	8.	%	R
	Total	%	R

STANLIB banking details

Account name:	**Classic Investment Trust**	Account name:	**Classic Retirement Annuity Fund**
Account number:	22-0405-328	Account number:	02-3057-882
Bank:	Standard Bank	Bank:	Standard Bank
Branch code	018105	Branch code	018105
Branch name	Sandton) City	Branch name	Sandton) City
Account type:	Current	Account type:	Current

Regular withdrawal option

(For Classic Investment Plan only. Only to be completed if there is a change to the regular existing regular withdrawal instruction.)

Withdrawal amount R ____ . __

Repurchase frequency ☐ Monthly ☐ Quarterly ☐ Half-yearly ☐ Yearly

Please note: the minimum permissible regular withdrawal is R500.00.

Representative (financial adviser) details

Name of financial adviser

Financial adviser code FSP licence number

Name of brokerage/ Financial consultancy/FSP

Initial adviser fee (applicable to ad-hoc) %

Terms and conditions

- The general and specific terms and conditions currently applicable to the selected investement product will apply to this ad-hoc investment, as though it was a new application.
- The current Classic fee structure will apply.
- STANLIB will only accept instructions from the client's financial adviser completed and signed the STANLIB FSP Authorisation Form.
- The client hereby agrees to provide all documentation and information in terms of the Financial Intelligence Centre Act, No 38 of 2001, and understand that STANLIB is prohibited from processing any transaction ont he client's behalf until all such documentation and information has been received. (Access the STANLIB website on www.stanlib.com to view the applicable FICA requirements).
- The client confirms that neither STANLIB nor any of it representatives provided him/her with any advice and that he/she has taken particular care to consider on his/her own or with the assistance of his/her FSP (financial adviser) whether the transaction is appropriate considering his/her unique objectives, financial situation and particular needs..
- The annual adviser fee, as agree to in the original application form, will continue to apply to the full investment.

Declaration

I/We hereby agree to provide all documentation and information required in terms of STANLIB's business rules and the Financial Intelligence Centre Act, No. 38 of 2001, and understand that STANLIB is prohibited from processing any transaction on my behalf until all such documentation and has been provided.

I/We confirm that all information provided herein is true and correct and that I have read and understood the contents of this form.

Signature of client Date D D - M M - 2 0 Y Y

Signature of intermediary Date D D - M M - 2 0 Y Y

Please note that in the event of any modification or variation of this standard form STANLIB will regard this form as being invalid and of no force and effect.