



STANLIB

Liberty Bold Living Annuity

Underwritten by Liberty Group Limited, a registered Long-Term Insurer.

Additional Investment Form

Note: Phase-in options are not available for Additional Investments.

Note: If the Client has an existing guarantee, the existing guarantee will be reset to include this additional investment. A new initial guarantee charge will be incurred when resetting the guarantee, on the combined investment amount. It is taken upfront from the additional investment and on the current investment balance prior to the allocation.

CLIENT DETAILS

INVESTMENT NUMBER	<input type="text"/>
NAME & SURNAME/ENTITY NAME	<input type="text"/>
IDENTITY/PASSPORT/REGISTRATION NUMBER	<input type="text"/>
CELL PHONE NUMBER	<input type="text"/>

PLAN DETAILS

TOTAL INVESTMENT AMOUNT R .

SOURCE OF ADDITIONAL INVESTMENT NEW INVESTMENT TRANSFER FROM ANOTHER ADMINISTRATOR

STANLIB will invest the total amount once all deposits have been received, unless you indicate that multiple deposits will be received.

INVEST AS AND WHEN DEPOSITS ARE RECEIVED

COMPANY/S TRANSFERRING FROM

Name	Product (i.e. Preservation Pension Plan)	Amount
		R
		R
		R
		R
		R



BRANCH	<input type="text"/>	BRANCH CODE	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ACCOUNT NUMBER	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ACCOUNT TYPE	<input type="checkbox"/>	CHEQUE	<input type="checkbox"/>	SAVINGS	<input type="checkbox"/>	TRANSMISSION						
ACCOUNT HOLDER'S ID NUMBER	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ACCOUNT HOLDER'S NAME	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

FINANCIAL SERVICE PROVIDER

The Terms and Conditions signed and agreed to in the Investment Application form will remain in force and apply to this transaction.

FINANCIAL SERVICE PROVIDER 1

NAME OF FSP / ENTITY	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
FSP/ ENTITY LICENCE NUMBER	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
LIBERTY CONSULTANT CODE	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
STANLIB ID	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
NAME OF SOLE PROPRIETOR OR REPRESENTATIVE	<input type="text"/>											
FEE SPLIT	<input type="text"/>	<input type="text"/>	.	<input type="text"/>	<input type="text"/>	%						

FINANCIAL SERVICE PROVIDER 2

NAME OF FSP / ENTITY	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
FSP/ ENTITY LICENCE NUMBER	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
LIBERTY CONSULTANT CODE	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
STANLIB ID	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
NAME OF SOLE PROPRIETOR OR REPRESENTATIVE	<input type="text"/>											
FEE SPLIT	<input type="text"/>	<input type="text"/>	.	<input type="text"/>	<input type="text"/>	%						

FINANCIAL SERVICE PROVIDER CHARGES (EXCLUDING VAT)

Where the Client has not specified an Initial FSP charge for lump sum investments, STANLIB will not deduct this fee.

INITIAL FSP CHARGE: LUMP SUM INVESTMENT %

TERMS AND CONDITIONS

- General**
- The terms and conditions signed and agreed to in the Investment Application form will remain in force and apply to this transaction. Refer to your Investment Application form for the detailed terms and conditions. Alternatively you can request a copy of the terms and conditions from your financial adviser or the Contact Centre on 0860 123 003.
 - Some of the terms and conditions are set out in the Investment Application form and the remainder is set out in this form. The Client agrees to be bound by the terms and conditions as set out in the Investment Application form as well as those set out in this form. In the event of a conflict between the terms and conditions in the Investment Application form and the terms and conditions contained in this Additional Investments form, the terms and conditions in this form will apply.
 - The Client acknowledges that they have been made aware that their guarantee is reset when adding an additional contribution within a guarantee period, and that a new initial guarantee charge applies on the combined investment.
 - The Client 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 on the 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 its 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 intermediary fee, as agreed to in the original application form, will continue to apply to the full investment fee until cancelled by the Client.
 - The Client understands that where he/she changes FSP the consequences of such a change may result in different or new fund and fees structures. This may result in an increase to the platform service charges. It is the Client's and where applicable the Client's financial adviser's responsibility to determine the relevant fund and or charge implications. STANLIB will deduct the charges from the Client's portfolios. For further details please refer to the Fee Comparison Tool on STANLIB online.
 - The Client understands that there are specific platform service charges applicable to the different platforms and where he/she invests new charge structures could apply to the portfolios and/or platform. It is the Client's responsibility, or where applicable that of the Client's financial adviser, to determine the relevant charge structures prior to investing. Please refer to www.stanlib.com for a complete list of the underlying portfolio and/or platform charges.
 - STANLIB reserves the right in its sole discretion to reduce or increase the service charges depending on circumstances. STANLIB will advise Client of any changes to service charges before they are implemented. It is the Client's responsibility, or where applicable that of the Client's financial adviser, to determine the relevant charge structures applicable to the investment before investing and that they understand and agree to any changes. The charges on the Client's investment will be reflected in his/her quarterly statements. (For further details please refer to STANLIB online on www.stanlib.com to view the applicable charges).
 - FAIS Ombudsman: Website: www.faisombud.co.za; Email: info@faisombud.co.za; Telephone: +27 (0)12 762 5000 / +27 (0)12 470 9080. Facsimile: +27(0)86 764 1422; Address: Sussex Office Park, Ground Floor, Block B, 473 Lynnwood Road Cnr Lynnwood Road & Sussex Ave, Lynnwood, 0081.
 - The Ombudsman for Long-Term Insurance: Website: www.ombud.co.za; Telephone:+27 (0)21 657 5000; Email: info@ombud.co.za; Address: Third Floor, Sunclare Building, 21 Dreyer Street, Claremont, Cape Town, 7700.



DECLARATION

We are required to collect, process and share your Personal Information (PI). Your PI is collected and processed by our staff, representatives or sub-contractors and we make every effort to protect and secure your PI. You are entitled at any time to request access to the information STANLIB has collected, processed and shared.

I/We 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 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/
AUTHORISED SIGNATORY

DATE

		-			-				
D	D		M	M		Y	Y	Y	Y

SIGNED AT

SIGNATURE OF FINANCIAL ADVISER

DATE

		-			-				
D	D		M	M		Y	Y	Y	Y

SIGNED AT

STANLIB Wealth Management (Pty) Limited Registration number 1996/005412/07 is an Authorised Administrative FSP in terms fo the FAIS Act, 2002 (FSP26/1/590).

Liberty Group Limited is a registered Long-Term Insurer and an Authorised Financial Service Provider in terms of the FAIS Act (no. 2409).

