Facsimile 0867 277 516



STANLIB

Liberty Living Annuity

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

Update of Annual Platform Service Charge

CLIENT DETAILS													
INVESTMENT NUMBER													
NAME & SURNAME													
IDENTITY / PASSPORT NUMBER													

ANNUAL PLATFORM SERVICE CHARGE

I HEREBY AGREE TO STANLIB LEVYING AN ANNUAL PLATFORM SERVICE CHARGE ACCORDING TO THE TIERED PLATFORM FEE SCALE TABLE BELOW, WHEREBY EACH PORTION OF THE INVESTMENT VALUE IS SUBJECT TO THE PLATFORM FEE OF THE INVESTMENT BAND IN WHICH IT FALLS.

Investment Band	Platform Fee Percentage (excl. VAT)
R0 to R999 999.99	0.5% p.a.
R1 000 000 to R2 999 999.99	0.3% p.a.
R3 000 000 to R9 999 999.99	0.2% p.a.
R10 000 000 +	0.1% p.a.

- The annual platform service charge is subject to Value Added Tax (VAT).
- Please refer to the Terms and Conditions, contained in your Welcome Pack, for more detailed information on the annual platform service charge.

COOLING OFF

If you opt-in to the new platform fee scale, you will be entitled to a 31-day period to cool off (cancel) this option. This means that you can reverse this decision and revert to your original platform fee scale.

If you do decide to cool off from the new platform fee scale you will no longer have access to the aggregation feature.

A cancellation request must be sent to us within 31 days from the date the "Update of Annual Platform Service Charge" form is submitted to STANLIB.

Where we have not received the required notice of cancellation for this option you have taken on your policy, within the 31-day period, the new platform fee scale will apply to your policy.

To exercise your cooling-off rights herein please speak to your Financial Adviser or contact STANLIB directly at 0860 123 003.

PLEASE NOTE:

If you opt-in to the new platform fee scale AND add the Income Enhancer Benefit (IEB), you will not be able to exercise any cooling-off rights. This means that you cannot cancel the new platform fee scale and the IEB once the IEB has been added.



DECLARATION

- 1. 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.
- 2. 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.
- 3. 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	DA		D I		M	M	-	Y	Y	Y	Y
	SIG	GNED AT									
SIGNATURE OF FINANCIAL ADVISER	DA	те		-			-				
	SIG	GNED AT	D I)	М	М		Y	Y	Y	Y

STANLIB Wealth Management (Pty) Limited Registration number 1996/005412/07 is an Authorised Administrative FSP in terms of the FAIS Act, 2002 (FSP No. 590).

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

