

INCOME CHANGE INSTRUCTION



Instructions

1. Please email this instruction to instruct@ashburtoninvest.co.za.
2. Please complete all relevant sections of this application in order for us to process this instruction.
3. Terms and Conditions are available on our website at www.asburtoninvestments.com, from our Client Service Team on 0860 274 287 or from your Financial Advisor. By signing this form you acknowledge that you have read and understood these, and that you will be bound by such Terms and Conditions.
4. All valid instructions received before 2pm on a business day, will be processed on the same day and receive the closing price of the following business day.
5. The Administrator will only process this instruction when all required documents are received.

The FNB Living Annuity is underwritten by FirstRand Life Assurance Limited ("Insurer"), Long-term Licence Number 00102/001, Registration Number 2014/264879/06.

FNB Investor Services Proprietary Limited ("Administrator"), Registration Number 2011/139123/07, is an authorised administrative financial services provider (FSP Number 44341) and is the administrator of this investment.

1. Investor details

Investor ID: _____ Contract number:

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Individual investor

Title: _____ Surname: _____
First name(s): _____
ID/Passport number:

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Date of birth:

Y	Y	Y	Y	M	M	D	D
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 Telephone number:

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Person acting on behalf of investor

Title: _____ Surname: _____
First name(s): _____
ID/Passport number:

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2. Income details

The pre-tax annuity income is subject by legislation to a minimum of 2.5% per annum and maximum of 17.5% per annum. For your income to be paid on the selected day of the month, your instruction with supporting documentation must be received by 2pm 5 business days before the scheduled payment date. Refer to the events calendar on the website for scheduled payment dates.

Please indicate the annuity amount you require per annum, payable in advance.

Annuity (%): _____ % or

R																			
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 per annum

Annuity income frequency

Monthly Quarterly Half-yearly Annually

Annuity frequency and amount can only be changed annually on anniversary date.

Select income disinvestment

- Proportionately across fund selection (default option)
 From specific funds, complete table below (if funds are depleted allocation will change to proportionately)

Instrument name	Amount	Percentage
	R	%
	R	%
	R	%
	R	%
	R	%
	R	%
	R	%
	R	%
Total	R	%

3. Declaration by investor

1. I warrant that all information provided by me in this form and all other applicable documents to this instruction are true and correct in every respect.
2. I have read, understood and agree to be bound by the relevant and latest Terms and Conditions available on www.ashburtoninvestments.com or from the Client Service Team on 0860 274 287.
3. I agree that where I have a financial advisor, that he/she shall have access to my information which is available on www.ashburtoninvestments.com.
4. I confirm that the Administrator has not given me any advice, in relation to this instruction.

Signed at _____

Date:

Y	Y	Y	Y	M	M	D	D
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Signature of investor (or duly authorised person(s) where applicable): _____

Signature of person acting on behalf of investor (if applicable): _____

Capacity of person acting on behalf of investor: _____