

# Person Acting on Behalf of Investor Form

Ashburton Management Company RF (Proprietary) Ltd ("Ashburton") is the administrator of the Ashburton range of unit trusts, and is authorised to do so as a manager in terms of the Collective Investment Schemes Control Act (no 45. of 2002).

## Instructions

1. Please complete this form if you are acting on behalf of the investor e.g. legal guardians or persons with power of attorney.
2. FICA documents must be supplied for the persons acting on behalf of the investor. Please refer to our checklist obtained on our website at [www.ashburtoninvestments.com](http://www.ashburtoninvestments.com).
3. Submit this form, together with the application or relevant instruction form, and email to [ashburtoninstruct@investoradmin.co.za](mailto:ashburtoninstruct@investoradmin.co.za) or fax to 0860 762 468.

## 01. Investor details

Title  Surname

First name(s)

Identity/Passport number

Country of issue of passport  Expiry date of passport

## 02. Person acting on behalf of investor

Title  Surname

First name(s)

Identity/Passport number  Date of birth

Country of issue of passport  Expiry date of passport

Please list all your tax registration details below. Note that line 1 is reserved for South African tax registration details.

No.	Tax identification number	Country of issue	Are you considered to be a citizen in this country?		Are you considered to be a national in this country?		Are you currently a tax resident in this country?	
1		South Africa	Yes	No	Yes	No	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2			Yes	No	Yes	No	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3			Yes	No	Yes	No	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4			Yes	No	Yes	No	Yes <input type="checkbox"/>	No <input type="checkbox"/>
5			Yes	No	Yes	No	Yes <input type="checkbox"/>	No <input type="checkbox"/>
6			Yes	No	Yes	No	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Country of residence

Physical address

Country  Area code

Telephone number (home)

Telephone number (office)

(+) country dialling code ( )

(+) country dialling code ( )

Mobile number

(+) country dialling code ( )

Email address

By signing this form you declare that:

1. I warrant that all information provided by me in this form and all other applicable documents are true and correct in every respect.
2. I have read, understood and agree to the Terms and Conditions available on [www.ashburtoninvestments.com](http://www.ashburtoninvestments.com) or from the Client Service Team on 0860 000 339 and agree to be bound by such Terms and Conditions.

**Person acting on behalf of investor**

**Date**

| Y | Y | Y | Y | M | M | D | D |