

- Please send the completed form and documentation to 086 680 3187 (fax) or taxfree@coronation.co.za.
- Should you have any queries or if you would like an investment quote for comparison purposes, kindly call us on 0800 22 11 77 or email clientservice@coronation.co.za.

A: IMPORTANT INFORMATION

As a security measure, a consultant from Coronation will call you for your personal authorisation to process this instruction.

Please send the following completed documentation to taxfree@coronation.co.za or **086 680 3187 (fax)**:

- If **your name** has changed: A copy of your ID, bearing ID number and photograph
- If **your address** has changed: Proof of residential address (e.g. utility bill or telephone account less than 3 months old)
- If **your bank account** has changed: Proof of banking details (bank statement or cancelled cheque less than three months old)

B: EXISTING INVESTOR DETAILS

Full name: _____

ID number: _____ Coronation investment number: _____

I am acting on behalf of an investor.

For example, guardians and persons with Power of Attorney or mandate acting on behalf of disabled or insolvent persons.

Full name: _____ ID (or Passport Number): _____

Contact telephone: (_____) _____

Email address: _____

C: NEW DETAILS

Please complete relevant information.

Title: _____ Surname: _____

First name(s): _____

Postal address: _____

_____ Code: _____

Residential address: _____

_____ Code: _____

Home telephone number: (_____) _____ Work telephone number: (_____) _____

Cellphone number: (_____) _____ Fax number: (_____) _____

Email address: _____



D: NEW BANK ACCOUNT DETAILS

Bank: _____ Account number: _____

Branch: _____ Branch code: _____

Type of account: Current/Cheque Transmission Savings

Name of account holder number: _____

Signature of account holder:

SIGN WITHIN THE BOX



The bank account needs to be in the investor's name.

A member of our client service team will call you to confirm the change.

If the investor is a minor, the bank account needs to be in the child's name.

Payments cannot be made to credit cards and money market accounts.

E: PLEASE SIGN TO CONFIRM THAT THE INFORMATION PROVIDED IS CORRECT

Signature of investor or authorised representative:

SIGN WITHIN THE BOX

Date: _____ [d] / _____ [m] / _____ [y]