

- 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: 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: _____



B: SWITCHING INVESTMENT

Please specify which investment should be switched, and to which fund. Kindly state the rand amount that should be switched, or tick the option to switch the entire amount.

FUND NAME	FROM			TO		
	Rand amount	or	Entire investment	Rand amount	or	Entire investment
Strategic Income Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Balanced Defensive Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Capital Plus Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Balanced Plus Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Top 20 Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Money Market Fund (Minimum single investment of R10 000)	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Defensive Income Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
SA Income Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Active Income Plus Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Equity Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
SA Equity Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Market Plus Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Bond Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Financial Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Industrial Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Property Equity Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Resources Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Smaller Companies Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Global Strategic USD Income [ZAR] Feeder Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Global Capital Plus [ZAR] Feeder Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Global Managed [ZAR] Feeder Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Global Optimum Growth [ZAR] Feeder Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Global Opportunities Equity [ZAR] Feeder Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Global Emerging Markets Flexible [ZAR] Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Global Equity Select [ZAR] Feeder Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>



Before making a decision, please review the Comprehensive Fact Sheets of the different funds on www.coronation.com. We also recommend that you speak to a financial adviser, who can assess your financial needs.



We can process your transaction as soon as we have received your signed switch form. Should this reach us before 14:00 (12:00 for the Money Market Fund) on any given business day, the transaction will be executed using that day's closing price. You will receive a confirmation of the transaction on the next business day.



C: ARE YOU INVESTING VIA DEBIT ORDER

Please tick the correct option.

My existing debit order remains in place.

Starting from: _____ [d] / _____ [m] / _____ [y] the existing debit order should be transferred to the following fund(s):

FUND NAME	Debit Order amount
_____	R
_____	R
_____	R
_____	R

The existing debit order should be cancelled.

Debit order authorisation signature:

SIGN WITHIN THE BOX

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

I/ We warrant that the information contained herein is true and correct, and that I/we have power and authority to enter into and conclude this transaction.

D: FINANCIAL ADVICE

I did not receive financial advice about this investment.

I have received financial advice, but do not require Coronation to pay fees on my behalf.

I have received financial advice from the financial adviser listed in this section. I instruct Coronation to deduct the following advice fees to pay the adviser on my behalf:

Initial advice fee: _____ % (Negotiable to a maximum 3%, exclusive of VAT). Applied to each deposit and deducted before the investment is made.

Annual advice fee: _____ % per annum of the market value of the investment portfolio, deducted and paid monthly in arrears. (Negotiable to a maximum 1%, exclusive of VAT. If an initial advice fee greater than 1.5% is selected, then the maximum annual advice fee is 0.5%).

This annual advice fee is not part of the normal annual management fee charged by the relevant fund(s). You may revise or terminate financial advice fees by written notice to us.

Signature of Investor or Authorised Representative:

SIGN WITHIN THE BOX



E: INVESTOR DECLARATION

I hereby acknowledge that the same terms and conditions that are applicable to my original investment apply to this investment and that I have read the appropriate comprehensive fact sheet information available on Coronation's website (www.coronation.com/za/personal/complete-fund-range-fact-sheets).

Signature of investor or authorised signatory:

SIGN WITHIN THE BOX

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