



## UNIT TRUST INVESTMENT PLAN

### SWITCH FORM

(To be completed by investors who wish to switch from one fund to another within their Unit Trust Investment Plan account)

#### IMPORTANT INFORMATION

- Please send this form and all associated documents directly to the Administrator (by email only) to the following email address **instructions@itransact.co.za**
- Automated Outsourcing Services (Pty) Ltd, trading as Itransact is an authorised Financial Services Provider (FSP 650) and is the Administrator of this product.
- The responsibility of transmitting the documents to the Administrator lies with the sender.
- Lump sum investments will only be processed upon proof of deposit of funds into the relevant inflow bank account associated with this product and receiving all the relevant documentation.
- It is important that you have read and understood all the latest product media, terms and conditions associated to this product before you sign this form, all of which are available from the Administrator whose details are provided at the end of this form.**

### SECTION 1: INVESTOR DETAILS

Investor Number	<input type="text"/>
First Name or Trading Name (If a legal entity)	<input type="text"/>
	<input type="text"/>
Surname	<input type="text"/>
	<input type="text"/>

**If any of your contact details have changed since your initial investment, please provide updated details in the spaces below.**

Cell Phone Number	<input type="text"/>
Other Contact Number	<input type="text"/>
Email Address	<input type="text"/>

### SECTION 2: SWITCH DETAILS

I/We hereby request the administrator to switch securities from my/our account as follows:

From (Fund Name)	Rand Amount	Or Units	Or %	To (Fund Name)	Switch Debit Order
<input type="text"/>	R <input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/>	<b>YES</b> <b>NO</b>
<input type="text"/>	R <input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/>	<b>YES</b> <b>NO</b>
<input type="text"/>	R <input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/>	<b>YES</b> <b>NO</b>
<input type="text"/>	R <input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/>	<b>YES</b> <b>NO</b>

**Please note that transaction fees are charged on both the buy and sell legs of this transaction.**

- Where investments have been ceded as security, the written consent of the cessionary must be provided before this instruction can be processed.
- Capital Gains Tax liabilities may arise from the sale of units when effecting a switch transaction.



Cell Phone Number

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Other Contact Number

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Email Address

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**SECTION 6: ADMINISTRATOR CONTACT DETAILS**

**Financial Advisor Support Centre**

Telephone 086 143 2383 | Fax 086 743 6959 | Email [info@itransact.co.za](mailto:info@itransact.co.za)

**Investor Support Centre**

Telephone 086 146 8383 | Fax 086 743 6959 | Email [investor@itransact.co.za](mailto:investor@itransact.co.za)

[www.itransact.co.za](http://www.itransact.co.za)