

ENDOWMENT POLICIES

WITHDRAWAL / LOAN APPLICATION FORM

IMPORTANT INFORMATION

1. Please send this form and all associated documents directly to the Administrator (by email only) to the following email address:
instructions@itransact.co.za
2. Automated Outsourcing Services (Pty) Ltd, trading as Itransact is an authorised Financial Services Provider (FSP 650) and is the Administrator of this Policy.
3. Investors can request one withdrawal and/or one zero interest loan within the five year restriction period. The total of withdrawal/loan options may not exceed your Investment Amount plus 5% interest compounded annually.
4. The responsibility of transmitting the documents to the Administrator lies with the sender.
5. No form will be considered complete without all the required fields being completed and the required supporting documentation being submitted. The Administrator reserves the right to reject any application and or instruction at any time due to incomplete or insufficient documentation and information.
6. **It is important that you have read and understood all the latest policy documentation before you sign this form, which is available from the Administrator whose details are provided at the end of this form.**

SECTION 1: INVESTOR DETAILS

Investor Account Number

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First Name

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Surname

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

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

Cell Phone Number

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Other Contact Number

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Email Address

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

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SECTION 2: INVESTOR CONFIRMATION

- If the investment is in the name of an individual, complete the 'Confirmation by individual Investor' section below.
- If the investment is ceded, please ensure that the 'Consent by security cessionary' section below is completed

Confirmation by individual Investor:

- I am legally entitled to deal with this investment. My estate is solvent and has not been surrendered or sequestrated.
- This investment has not been ceded or pledged to anyone either by antenuptial contract or otherwise.

Consent by security cessionary

(Complete if the investment has been ceded as security)

Limitations will apply to the withdrawal/loan amount when the investment is in a restriction period.

I agree to the withdrawal/loan as applied for in this form.

Registered name of security cessionary

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Registration number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Name & Surname of signatory

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Contact number of signatory

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Capacity of signatory

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Signature of signatory

Date

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Signed at

SECTION 3: WITHDRAWAL/LOAN INSTRUCTION

How much do you want to withdraw? (Choose one option only)

☐

Withdraw / loan all available investments under this Policy.

☐

Partial Withdrawal / loan of investments under this Policy.

Note: You are responsible for obtaining your own professional advice about the consequences of withdrawing / taking a loan from this Policy. Specifically, you must be aware that as a result of a withdrawal / loan, you may or may not incur a tax liability. It is your responsibility to declare all tax liabilities to the relevant authority.

SECTION 4: INVESTOR BANK DETAILS

This bank account must be a South African bank account in the name of the Investor or the Investor's legal guardian in the case of a minor.

Name of Account Holder

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Name of Bank

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Account Number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Branch Name

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Branch Code

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Account Type

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

SECTION 5: INVESTOR DECLARATION

1. The latest Policy documentation associated to this investment is applicable. The Investor is responsible for ensuring that he/she has read and understood the documentation. Copies of the Policy documentation may be requested from the Administrator.
2. The Investor confirms that all statements made and information provided on this form are correct.

Date (ddmmyyy)

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Signature of Investor or duly authorised person

Print Initials and Surname

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Signed at _____

Capacity of signatory

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SECTION 6 FINANCIAL SERVICES PROVIDER (FSP) DECLARATION

1. The Policy documentation associated to this investment is applicable. The FSP is responsible for ensuring that he/she/it has read and understood the documentation and has before explained the contents thereof to the Investor in full. Copies of the documentation may be requested from the Administrator.
2. The FSP confirms that all statements made and information provided on this form are correct.

Date (ddmmyyy)

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Signature of Authorised FSP/Representative

Print Initials and Surname

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SECTION 7: FINANCIAL SERVICES PROVIDER (FSP) DETAILS

Name of the FSP

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Telephone

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Facsimile

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Email

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Tick the box if the details below are the same as the FSP details above ☐

Name of Representative	<div></div> <div></div>																		
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Email	<div></div> <div></div>																		

SECTION 8: ADMINISTRATOR CONTACT DETAILS

Financial Advisor Support Centre
Telephone 086 143 2383 | Fax 086 743 6959 | Email info@itransact.co.za

Investor Support Centre
Telephone 086 146 8383 | Fax 086 743 6959 | Email investor@itransact.co.za

www.itransact.co.za