



## ACTING ON BEHALF OF AN INVESTOR - INDIVIDUAL

This form must be completed where a natural person (who is not a registered FSP and is not providing advice or financial services to the investor) is acting on behalf of the investor (eg parent or legal guardian of a minor).

### IMPORTANT INFORMATION

This document must be sent together with the product application form to the Administrator by email at [newbus@itransact.co.za](mailto:newbus@itransact.co.za)

## SECTION 1: DETAILS OF THE PERSON ACTING ON BEHALF OF THE INVESTOR

Title Mr  Ms  Mrs  Dr  Prof  The Hon

Name

Surname

Date of Birth (ddmmyy)

Identity/Passport Number

Nationality

Relationship

Residential Address

Postal Address  Code

Cell Phone Number

Other Contact Number

Email Address

Are you or any controlling person associated with this investment a US citizen or US residency? Yes  No

Are you a tax resident of another country other than South Africa? Yes  No

If yes, please complete the below section

**Countries of Citizenship**


**Passport Number**


**Tax Information**

If you are a resident in the US you must also complete and return an Internal Revenue Services ("IRS") W-9 form, available on the www.irs.gov, and include any tax residencies in the table below:

**Countries of Tax Residency**


**Tax Number**


**DECLARATION**

I confirm that all information provided herein is true and correct and that I have read and understood the contents of this form.

I confirm that I am authorised to act on behalf of the investor. (e.g. parent, legal guardians, etc)

I agree to notify the administrator immediately if information on this change.

I am aware that the administrator is obliged to provide the South African Revenue Services (SARS) with certain information when you transact with them. SARS will in turn pass the information to the Internal Revenue Services (IRS) of the USA.

\_\_\_\_\_ Date (ddmmyyy) 

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**Signature**

Print Initials and Surname
