



ACTING ON BEHALF OF AN INVESTOR

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.

IMPORTANT INFORMATION

This document must be sent together with the product application form to the Administrator by email at newbus@itransact.co.za

SECTION 1: INVESTOR INFORMATION

Investment Number

Name/ Registered Name

Surname

ID/Registration Number

SECTION 2: 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

 Code

Postal Address

 Code

Cell Phone Number

Other Contact Number

Email Address

Are you a foreign prominent public official or a domestic prominent influential person? Yes No

If yes, please specify:

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

Is your Country of birth or Nationality not South Africa? Yes No

If you have answered 'Yes' to any of the previous questions, please complete the Foreign Account Tax Compliance Act - Self-certification Form available from the Administrator and/or its website or from your financial advisor.

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 (ddmmyyyy)

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Signature

Print Initials and Surname
