



# APPLICATION FOR INVESTMENT

If you are new to Fedgroup, please sign up via our Fedgroup App or complete a **CLIENT** or **INSTITUTIONAL APPLICATION FORM**.

Client ID number/Registration number

Fedgroup number

Surname/Registered name

Initials

|                                    | Lump sum (R)              | Recurring (R)           | Annual Esc (%) | Advisor fee (upfront) | Advisor fee (annual) |
|------------------------------------|---------------------------|-------------------------|----------------|-----------------------|----------------------|
| Secured Investment                 | Min R5 000 per investment |                         |                | Max 3%                | Max 1.5%             |
| Tax-Free Savings Account           | Min R5 000 per investment | Min R500 per investment |                | Max 3%                | Max 1%               |
| Money Market Fund Unit Trust       | Min R5 000 per investment | Min R500 per investment |                | Max 3%                | Max 1.5%             |
| Income Plus Fund Unit Trust        | Min R5 000 per investment | Min R500 per investment |                | Max 3%                | Max 1.5%             |
| General Equity Fund Unit Trust     | Min R5 000 per investment | Min R500 per investment |                | Max 3%                | Max 1.5%             |
| Large Cap Equity Fund Unit Trust   | Min R5 000 per investment | Min R500 per investment |                | Max 3%                | Max 1.5%             |
| Worldwide Flexible Fund Unit Trust | Min R5 000 per investment | Min R500 per investment |                | Max 3%                | Max 1.5%             |

Proposal number:

To keep things simple for Endowments, Flex Income Plan, or a multi product plan, simply insert your proposal number.

Payout:

|                                 | Rand                 | Percentage           |
|---------------------------------|----------------------|----------------------|
| Secured Investment Interest     | <input type="text"/> | <input type="text"/> |
| Unit Trust Recurring Withdrawal | <input type="text"/> | <input type="text"/> |

Please confirm how you will be making payment.

If the investor is not the payer, please complete the Payer's Details section on page 2.

EFT\*  
  Debit Order  
 Lump sum collection date    
 Recurring collection date

\*Please provide proof of payment.

Recurring collection end month

Source of funds

Savings  
  Bonus  
  Inheritance  
  Salary  
  Someone else  
 Other

Investor's bank account details:

Investor's bank account number

ABSA  
  Capitec  
  FNB  
  Nedbank  
  Standard Bank  
 Other

Financial advisor's code

Financial advisor's surname

Initials

I acknowledge that all the information provided, along with any fees noted, are accurate and that I have reviewed the important information referred to on page 2 of this document.

INVESTOR'S/AUTHORISED SIGNATURE

Date

## PAYER'S DETAILS:

Only required if the payer is not the investor.

Surname

First name (s)

Date of birth

ID number/passport number (if foreign national)

Cell number

Email

### Source of funds:

Savings
  Bonus
  Inheritance
  Salary
 Other \_\_\_\_\_

### Payer's bank account details for collection.

Payer's bank account number

EFT\*
  Debit Order

Lump sum collection date

Recurring collection date

Recurring collection end month

\*Please provide proof of payment.

ABSA
  Capitec
  FNB
  Nedbank
  Standard Bank
 Other \_\_\_\_\_

I acknowledge that all the information provided is accurate and that I have reviewed the important information referred to in this document.

PAYER'S/AUTHORISED SIGNATURE

Date

## LEGAL STUFF

Dotting your i's and crossing your t's. We have gathered all the important elements relating to our products here. To make it easy for you to familiarise yourself with this information, we have provided a summary of this below.

For the full version of our Legal Stuff, please visit [www.fedgroup.co.za/Legal-Stuff](http://www.fedgroup.co.za/Legal-Stuff) or scan the QR code on the right.



### TERMS AND CONDITIONS

Ts and Cs are the norm with most providers. In order to help you understand exactly what our offering is and how we deliver it, we've put together comprehensive terms and conditions to ensure that our stakeholders are not prejudiced by individuals looking to manipulate any unforeseen loopholes.

### POPIA

Ever wondered what happens to your information after you have provided it, or why you have to provide certain types of information? In this section we explain what we do with your data and outline how it is used by all the companies within our broader group. Fedgroup and its activities fall under the provisions of the Protection Of Personal Information Act.

### FICA

We need to make sure that you are who you say you are, just like those websites that ask you to identify all the images with stop signs in them. Only, this is a pretty serious security matter driven by the Financial Intelligence Centre Act. While it can be time consuming, we've made it super simple via the Fedgroup App!

### DECLARATION

In the financial services space, we need confirmation of the information you have provided and the information provided to you. This section houses all the relevant declarations.

### DEBIT ORDER MANDATE

We never take anything without permission. This even applies when you tell us to collect funds from your account. The debit order mandate ensures that we have the necessary permission to do so.

### BANKING DETAILS

Unfortunately, we're not allowed to publish our banking details on public forums, but we'll send the relevant details to you once we've got your investment application.