FEDGROUP

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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 F G

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%	
Endowment: Impact Portfolio	Min R100 000 per investment	Min R3 000 per investment		Max 3%	**0.5% +**	Max 0.5%
Endowment: Diversified Alternates Portfolio	Min R100 000 per investment	Min R3 000 per investment		Max 3%	**0.5% +**	Max 0.5%

Proposal number: PN

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

Payout:

	Rand	Percentage
Secured Investment Interest		
Unit Trust Recurring Withdrawal		

Please confirm how you will be making payment. Not applicable to Living Annuity.

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

☐ *EFT ☐ Debit Order Lump sum collection date D D M M Recurring collection date D D

***Please provide proof of payment.**

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 D D M M Y Y Y Y

Fedgroup Financial Holdings (Pty) Ltd. is a licensed controlling company.
E investments@fedgroup.co.za

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PAYER'S DETAILS:

Only required if the payer is not the investor. Not applicable to Living Annuity.

Surname

First name (s)

Date of birth D D M M Y Y Y Y

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. Not applicable to Living Annuity.

Payer's bank account number

☐ *EFT ☐ Debit Order

Lump sum collection date D D M M Recurring collection date D D

***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 D D M M Y Y Y Y

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** 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.

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