intervest.co.za

Block A, Crystal Park
249 Basden Avenue
Lyttelton
Centurion

PO Box 7520, Centurion, 0046
Phone: 0860 223 333
Fax: (011) 388 3223

RETIREMENT ANNUITY ADDITIONAL CONTRIBUTION FORM
Voluntary contribution

The applicant must initial each page as well as any amendments made to the application form. Please fax all the pages of this form to CLIENT SERVICES at +27 (0) 11 388 3223 or email to direct@intervest.co.za. The Intermediary must retain the original document.

1. Member Details

Title _____ Surname _____

First Names _____

ID Number _____ Date of birth _____/_____/_____
DD MM YYYY

Telephone (Home) _____ Telephone (Work) _____

Telephone (Fax) _____ Telephone (Cell) _____

E-mail _____

Tax number _____

2. Source of Funds

Inheritance ☐ Savings ☐ Salary ☐ Bonus ☐

Inter-portfolio transfer ☐ FROM portfolio reference number: _____

Other (Specify) _____

3. Method of Payment

Cheque Deposit* ☐ All cheques must be endorsed as NON-TRANSFERABLE and deposited directly into the Fund bank account by the Member.

Electronic / Internet Transfer* ☐ Electronic internet transfers may take up to two days to appear in our bank account. Units may only be priced upon confirmed receipt of instruction and funds into the Fund bank account.
*See Fund Bank Account Details Section 5.

Existing Intervest Unit Trust Portfolio (Inter-portfolio transfer) ☐ If the funds you would like to transfer to your RA portfolio are not prudentially compliant (as per the list of compliant funds available on our website), you will have to first switch to a compliant fund and after the switch is completed the fund can be transferred.

4. Equinox Retirement Annuity Fund Details

Equinox Retirement Annuity Bank Account Details	
Account name:	Equinox Retirement Annuity Fund
Bank:	First National Bank
Branch:	Wierda Valley
Branch code:	260950
Account number:	621 224 964 34
Reference:	ID number, username or portfolio reference number

Equinox Retirement Annuity Fund Registration Details	
Financial Services Board Registration number	12/8/37710
SARS Registration number	18/20/4/41951

Intervest is a division of EFS Investment Solutions (Pty) Ltd. Registration No. 1999/014522/07. Financial Services Provider No. 563.
Directors: H van Wyngaarden, WP Morton, CM van der Merwe
Version 05/2009

Applicant's initials

5. Investment Details

Please note that the minimum investment amount as indicated on your initial application will apply for an additional contribution:

5.1 Investment Amount R ☐☐☐☐☐☐☐☐,☐☐

5.2 Source of funds (inheritance, bonus, salary, savings, transfer or specify other): _____

5.3 Fund selections:

ONCE-OFF INVESTMENT SELECTION

Please select from the list of unit trusts offered on the basis of compliance with Prudential Investment guidelines.

Existing RA Portfolio reference number _____

Fund/CIS name	**Class***	**Investment Amount**
_____	☐☐	R ☐☐☐☐☐☐☐☐,☐☐
_____	☐☐	R ☐☐☐☐☐☐☐☐,☐☐
_____	☐☐	R ☐☐☐☐☐☐☐☐,☐☐
_____	☐☐	R ☐☐☐☐☐☐☐☐,☐☐

*If the unit trust fund (CIS) class is not available or not indicated, the next available class of the same fund will be used.

6. Terms and Conditions

6.1 The terms and conditions that apply to this additional contribution are the same as those that apply to initial Retirement Annuity Fund investments. These terms and conditions are made available on our website www.intervest.co.za.

6.2 This additional investment is subject to Intermediary fees as currently indicated on the existing Intervest Retirement Annuity portfolio.

6.3 I hereby confirm that the Intermediary mentioned in 7 below is my appointed Intermediary.

Signed at _____ on this _____day of _____(month) _____(year)

Signature of Member _____

If this investor is under the age of 18: *Relationship to the investor:* *Parent* ☐ *OR* *Legal Guardian* ☐

Full name of authorised representative _____

Signature of authorised representative _____

7. Intermediary details

Name of Intermediary (Financial Advisor) _____

Signature of Appointed Financial Advisor _____ Date _____ / _____ / _____
DD MM YYYY

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