



**TRANSFER OF UNIT TRUSTS**

The applicant must initial 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](mailto:direct@intervest.co.za) together with a recent statement of the investment(s) being transferred. The intermediary must retain the original document.

**Unit trust owner detail:**

Title \_\_\_\_\_ Surname \_\_\_\_\_

First Names \_\_\_\_\_

ID Number \_\_\_\_\_ Date of birth \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
DD MM YYYY

Physical address \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_ Code \_\_\_\_\_

Telephone (Home) \_\_\_\_\_ Telephone (Work) \_\_\_\_\_

Telephone (Fax) \_\_\_\_\_ Telephone (Cell) \_\_\_\_\_

E-mail \_\_\_\_\_

Unit Trust Fund/CIS Name	Reference number	% or units to transfer

**Instruction:**

- I hereby authorise Intervest to receive the above-mentioned unit trust funds/CIS and furthermore do whatever is required to give effect to this instruction.
- I understand that the unit trust funds/CIS will only be reflected on my online account with the Administrator (Intervest) when the transfer has been completed.
- I hereby confirm that the unit trust funds/CIS that Intervest is to have transferred are not ceded or pledged or assigned in any way.
- I acknowledge to have read, understand and agree to be bound by the Intervest standard terms and conditions as contained on the Intervest website.
- I agree to pay Intervest the fees set out in the Fees Schedule of the terms and conditions, in return for the services rendered by it. I understand the fees may be amended subject to 3 months written notice. I hereby authorise Intervest to deduct any fees and amounts due to Intervest from my account.

**Please note that Intervest does not have the authority to cancel your existing debit orders at the management companies you are transferring these units from. Please cancel existing debit orders with these companies yourself.**

Signed at \_\_\_\_\_ on this \_\_\_\_\_ day of \_\_\_\_\_ year \_\_\_\_\_

**Signature of unit trust owner:** \_\_\_\_\_