

Death claim instruction

Unit Trust and Tax-Free Investment



1. What you need to know

1. Please reference the 'Guide to submitting a death claim' process and checklist for the supporting documents required to be submitted together with this form. Please email this form together with all required supporting documents to estates@nedgroupinvestments.co.za.
2. Nedgroup Investments will take instruction from the executor or person appointed to deal with the deceased's estate.
3. Withdrawals will only be paid into the estate late bank account.
4. If you have any questions, please contact our Client Services Centre on 0800 123 263 (from within SA) or on +27 21 412 2003 (from outside SA).

2. Details of deceased investor

Investor name

Investor number

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3. Withdrawal instruction

Full withdrawal

Is this a full withdrawal across all Unit Trust portfolios? Yes No

If 'No', please complete the partial withdrawal section below.

Partial withdrawal

If you require a partial withdrawal, please complete the table below.

Unit Trust portfolio	Account number	Please select EITHER a percentage OR a rand amount	
		Percentage	Rand amount
		%	OR R
Total		%	R

4. Estate late bank account

Please note:

- It is mandatory to complete this section
- Please provide proof of bank account

Name of account holder (as registered with bank)

Name of bank

Account number

Name of branch Code

Account type Current Savings Country

5. Unit Trust only: Transfer of ownership instruction

Please note:

- To process a transfer of ownership, this form must be submitted with:
 - If transferee is an existing investor: 'Client Details – Existing Individual Investor' and 'Transfer of ownership – Unit Trust' form
 - If transferee is a new investor: 'Client Details – New to Nedgroup Investments Individual' and 'Transfer of ownership – Unit Trust' form

Existing investor

Existing investor name

Existing investor number

New investor

New investor name

SA ID number / Passport number / Registration number

6. Unit Trust only: Security cession declaration

Please confirm whether any of the Unit Trust portfolio(s) from which you have requested a withdrawal or transfer have been ceded as security Yes No

If 'Yes', please return this form together with a letter from the cedent to which the investment is ceded, agreeing to your withdrawal request.

7. Declaration and signature

I confirm and certify that:

- The information I have completed in this form is to the best of my knowledge true and correct
- I understand that further information may be requested, and that the information provided may be corroborated with third parties

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Full name

Capacity

Nedgroup Investments

Nedbank Clocktower Clocktower Precinct V&A Waterfront Cape Town 8001 PO Box 1510 Cape Town 8000 South Africa

Nedgroup Investments Proprietary Limited (Company registration number 1996/017075/07)

Incorporating Nedgroup Collective Investments (RF) Proprietary Limited (Company registration number 1997/001569/07)

Nedgroup Investment Advisors Proprietary Limited (Company registration number 1998/017581/07) an authorised Financial Services Provider (FSP licence number 1652)

Directors: I Ruggiero, NA Andrew, RC Williams

www.nedgroupinvestments.com