

- All sections must be completed in full using BLOCK LETTERS.
- Indicate all options selected by means of a cross [X].
- Initial any amendments made to the application form.
- Ensure that all information provided is accurate.
- No instruction will be processed unless all requirements have been met.
- The daily cut-off for receipt of instructions is 14h00.
- Completed forms are to be faxed to us on (021) 680 2500 or e-mailed to [clientservice@coronation.co.za](mailto:clientservice@coronation.co.za).
- Should you have any queries regarding this application, please contact the Coronation Client Service Centre on 0800 22 11 77.

## A EXISTING DETAILS

Existing Investor number: \_\_\_\_\_

Surname/Company/Trust/Partnership/Close Corporation: \_\_\_\_\_

Title: \_\_\_\_\_ First name(s): \_\_\_\_\_

ID/Passport Number/Company/Trust/Partnership/Close Corporation Registration Number: \_\_\_\_\_

## B NEW DETAILS FOR CHANGE OF NAME

Surname/Company/Trust/Partnership/Close Corporation: \_\_\_\_\_

Title: \_\_\_\_\_ First name(s): \_\_\_\_\_

Postal Address: \_\_\_\_\_

\_\_\_\_\_ Code: \_\_\_\_\_

Residential Address: \_\_\_\_\_

\_\_\_\_\_ Code: \_\_\_\_\_

Telephone (home): \_\_\_\_\_ Telephone (work): \_\_\_\_\_

Fax number: \_\_\_\_\_ Cellphone Number: \_\_\_\_\_

E-mail address: \_\_\_\_\_

Name of Account Holder: \_\_\_\_\_

Name of Bank: \_\_\_\_\_ Branch name: \_\_\_\_\_

Branch code: \_\_\_\_\_ Account number: \_\_\_\_\_

Type of Account  Current  Transmission  Savings

Signature of Account Holder(s): \_\_\_\_\_ Date: \_\_\_\_\_

A cancelled cheque or recent bank statement must accompany this application as confirmation of proof of bank details.

### Investor(s) Signatures

Signature of Investor (1): \_\_\_\_\_ Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Signature of Investor (2): \_\_\_\_\_ Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

## **C** NEW BANK ACCOUNT DETAILS

Name of Account Holder: \_\_\_\_\_

Name of Bank: \_\_\_\_\_ Branch name: \_\_\_\_\_

Branch code: \_\_\_\_\_ Account number: \_\_\_\_\_

Type of Account  Current  Transmission  Savings

Signature of Account Holder(s): \_\_\_\_\_ Date: \_\_\_\_\_

A cancelled cheque or recent bank statement must accompany this application as confirmation of proof of bank details.

### **Investor(s) Signatures**

Signature of Investor (1): \_\_\_\_\_ Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Signature of Investor (2): \_\_\_\_\_ Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

## **D** SUPPORTING DOCUMENTATION

(Copies of the supporting documentation are sufficient as long as all text and photographs are clear and legible).

The following outlines the supporting documentation required in terms of the Financial Intelligence Centre Act No. 38 of 2001, as well as other documents required by Coronation to verify details listed in Section B.

### **For South African Citizens and Residents**

Change of Name – Copy of new ID document bearing ID number and photograph

Change of Address – Proof of residential address (e.g. utility bill or telephone account less than 3 months old)

Change of Bank Details – Proof of banking details (e.g. bank statement or cancelled cheque less than 3 months old)

### **For Foreign Nationals**

Change of Name – Copy of passport bearing passport number and photograph

Change of Address – Proof of residential address (e.g. utility bill or telephone account less than 3 months old)

Change of Bank Details – Proof of banking details (e.g. bank statement or cancelled cheque less than 3 months old)

Coronation Management Company Limited

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