

- ▶ The applicant must initial all amendments made to this application form.
- ▶ Please ensure that all information provided is accurate.
- ▶ Forward your instruction to 086 206 4098 or eflows@coronation.com.
- ▶ No instruction will be processed unless all requirements have been met.
- ▶ All instructions to be received by 14th of anniversary month.

A: INVESTOR DETAILS

Full name: _____
Client number: 104104 _____ Investment number: _____
Contact telephone number: (____) _____
Email address: _____

B: REVISED PENSION PAYMENT DETAILS

Pension payments may only be adjusted on the anniversary date of the purchase of the original living annuity.

To revise, select one of the following:

Payment frequency: monthly in arrears quarterly in advance half yearly in advance yearly in advance

Selected percentage: 2.5% 5% 10% 17.5% other: _____ the minimum pension payment is 2.5% per year; the maximum is 17.5%

OR selected rand value: Rands: _____ Cents: _____

Pay annuity proportionally across all funds OR Pay annuity from the _____ fund.

Apply a special tax rate? Yes No If yes, please specify rate: _____ %



A tax directive will be required annually if a lower rate than the legislated rate is applied for. This must be submitted by the Investor to Coronation Life.



This annuity amount will be paid according to the payment frequency selected above. Please ensure that you have familiarised yourself with the General Information and Conditions document.

C: DECLARATION

I understand and accept that such changes may only take place on contract anniversary.

I hereby instruct **Coronation Life Assurance Company Limited** and/or the administrator to amend my living annuity payments, as indicated herein, with effect from the next anniversary date of my living annuity and that I have read the appropriate comprehensive fact sheet information available on Coronation's website (www.coronation.com/za/personal/complete-fund-range-fact-sheets).

Investor signature:

SIGN WITHIN THE BOX

Date: _____ [d] _____ [m] _____ [y]



NEXT STEPS

- ▶ Please send the completed form and documentation to eflows@coronation.com or 086 206 4098 (fax).
A member of our client service team will contact you if more information is required.
- ▶ If we receive and verify all of the required documents before 14:00 on any given business day, the transaction will be executed using the next trading day's price. You will receive SMS confirmation of the transaction on the next business day.
- ▶ Should you have any queries, kindly call us on 0800 22 11 77 or email clientservice@coronation.com