

- Forward your instruction to 086 206 4098 or [eflows@coronation.co.za](mailto:eflows@coronation.co.za)
- Should you have any queries regarding this instruction, please contact the Coronation Client Service Centre on 0800 22 11 77.



As a security measure, a consultant from Coronation will call you to get your personal authorisation to process this instruction.

### IMPORTANT INFORMATION

This form is for withdrawals from your Retirement Lump Sum (savings) component, introduced under the two-pot system in September 2024.

- You may make one withdrawal per tax year.
- The minimum withdrawal amount is R2,000.
- Any withdrawal reduces the value of your retirement lump sum component that will be available to you in cash when you retire.
- The withdrawal process requires Coronation to apply to SARS for a tax directive on your behalf. This can cause delays to the processing of your payment.
- Coronation is obliged to withhold any tax instructed by SARS. This will reduce the value of the amount that is paid to your bank account.

### A: INVESTOR DETAILS

Full name: \_\_\_\_\_

Client number: 104104 \_\_\_\_\_ Investment number(s): \_\_\_\_\_

ID or Passport number (if foreign national): \_\_\_\_\_

Contact telephone number: ( \_\_\_\_\_ ) \_\_\_\_\_ Email address: \_\_\_\_\_

Income tax reference number: \_\_\_\_\_

Expected Annual Taxable income (for the Tax year)\*: \_\_\_\_\_

\*This excludes/is before the Savings Amount being requested/withdrawn

### B: WITHDRAWAL OPTIONS



Please note that there is a minimum withdrawal of R2 000.00

- The value of your funds available for withdrawal may change between the date that you complete this form and the date it is processed at Coronation. For this reason you may wish to complete your option as a percentage of your retirement lump sum available for withdrawal. Your option should be completed as either rands or as a percentage, not both.
- Ensure that there is no debt owed to SARS and that ALL investor tax affairs are in order before submitting to SARS.
- Your withdrawal will be processed proportionately across all the underlying investment options held in your retirement lump sum component.
- Tax simulations can be processed on your personal eFiling account by making use of the SARS Lumpsum Tax Calculator.

☐

Withdrawal amount Rands\*: \_\_\_\_\_

OR

☐

Withdrawal percentage: \_\_\_\_\_

\* Amount is gross of tax



### C: BANKING DETAILS



If the bank details provided do not match our records, there may be a delay in processing this instruction. To ensure your security, a consultant from Coronation will call you to confirm your personal authorisation.

Bank account into which cash lump sum must be paid:

Bank: \_\_\_\_\_ Account number: \_\_\_\_\_

Branch name: \_\_\_\_\_ Branch code: \_\_\_\_\_

Type of account: ☐ Current ☐ Savings

Account holder name: \_\_\_\_\_

Signature of account holder/authorised person:

SIGN WITHIN THE BOX



Payments will not be made to third-party accounts, credit cards, money-market accounts or bond accounts.

### D: STATEMENT BY MEMBER

- I understand that only one withdrawal per investment number, per tax year will be permitted, subject to the rules of the Fund and applicable SARS tax directive received.
- I further understand that a SARS tax directive will be applied for and note that should any additional amount be due to SARS, the cumulative tax amount will be deducted from the amount payable. Once this directive has been applied for it cannot be cancelled.
- I hereby warrant that the information given is to the best of my knowledge correct and I instruct and authorise the Fund to pay all monies due in accordance with the instruction subject to the rules of the Fund.

Signature of investor or authorised representative\*:

\* Please forward proof of authorisation.

SIGN WITHIN THE BOX

Date: \_\_\_\_\_ [d] / \_\_\_\_\_ [m] / \_\_\_\_\_ [y]



#### E: NEXT STEPS

- Please send the completed form and documentation to [eflows@coronation.co.za](mailto:eflows@coronation.co.za) or 086 206 4098 (fax). A member of our client service team will contact you if more information is required.
- You can manage your investments on our secure online platform. Simply register at [www.coronation.com](http://www.coronation.com) once you have received confirmation of your transaction and your investment number. If you are already registered, please link this investment to your portfolio. You'll find this option under Linked Investments in the profile menu.
- Statements will be sent to you every quarter and all transactions will be confirmed via SMS, email and/or postal letter.
- Should you have any queries, kindly call us on 0800 22 11 77 or email [clientservice@coronation.co.za](mailto:clientservice@coronation.co.za)

#### F: NOTES/ADDITIONAL INSTRUCTIONS