

- Please send the completed form and documentation to 086 680 3187 (fax) or [taxfree@coronation.co.za](mailto:taxfree@coronation.co.za).
- Should you have any queries or if you would like an investment quote for comparison purposes, kindly call us on 0800 22 11 77 or email [clientservice@coronation.co.za](mailto:clientservice@coronation.co.za).

### A: EXISTING INVESTOR DETAILS

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

ID number: \_\_\_\_\_ Coronation investment number: \_\_\_\_\_

I am acting on behalf of an investor.

*For example, guardians and persons with Power of Attorney or mandate acting on behalf of disabled or insolvent persons.*

Full name: \_\_\_\_\_ ID (or Passport Number): \_\_\_\_\_

Contact telephone: ( \_\_\_\_\_ ) \_\_\_\_\_

Email address: \_\_\_\_\_



## B: SWITCHING INVESTMENT

Please specify which investment should be switched, and to which fund. Kindly state the rand amount that should be switched, or tick the option to switch the entire amount.

FUND NAME	FROM			TO		
	Rand amount	or	Entire investment	Rand amount	or	Entire investment
Market Plus Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Balanced Plus Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Capital Plus Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Balanced Defensive Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Strategic Income Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Global Equity Select [ZAR] Feeder Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Global Opportunities Equity [ZAR] Feeder Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Global Managed [ZAR] Feeder Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Global Capital Plus [ZAR] Feeder Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Global Strategic USD Income [ZAR] Feeder Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Property Equity Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Money Market Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Jibar Plus Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Bond Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Financial Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Industrial Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Resources Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>
Smaller Companies Fund	R	or	<input type="checkbox"/>	R	or	<input type="checkbox"/>



Before making a decision, please review the Comprehensive Fact Sheets of the different funds on [www.coronation.com](http://www.coronation.com). We also recommend that you speak to a financial adviser, who can assess your financial needs.



We can process your transaction as soon as we have received your signed switch form. Should this reach us before 14:00 (12:00 for the Money Market Fund) on any given business day, the transaction will be executed using that day's closing price. You will receive a confirmation of the transaction on the next business day.



### C: ARE YOU INVESTING VIA DEBIT ORDER

Please tick the correct option.

- My existing debit order remains in place.
- Starting from: \_\_\_\_\_ [d] / \_\_\_\_\_ [m] / \_\_\_\_\_ [y] the existing debit order should be transferred to the following fund(s):

FUND NAME	Debit Order amount
	R
	R
	R
	R

- The existing debit order should be cancelled.

Debit order authorisation signature:

SIGN WITHIN THE BOX

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

I/ We warrant that the information contained herein is true and correct, and that I/we have power and authority to enter into and conclude this transaction.

### D: INVESTOR DECLARATION

I hereby acknowledge that the same terms and conditions that are applicable to my original investment apply to this investment 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](http://www.coronation.com/za/personal/complete-fund-range-fact-sheets)).

Signature of investor or authorised signatory:

SIGN WITHIN THE BOX

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