

- 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: IMPORTANT INFORMATION

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

Please send the following completed documentation to [taxfree@coronation.co.za](mailto:taxfree@coronation.co.za) or **086 680 3187 (fax)**:

- If **your name** has changed: A copy of your ID, bearing ID number and photograph
- If **your bank account** has changed: Proof of banking details (bank statement or cancelled cheque less than three months old)

### B: 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: \_\_\_\_\_

### C: NEW DETAILS

*Please complete relevant information.*

Title: \_\_\_\_\_ Surname: \_\_\_\_\_

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

Postal address: \_\_\_\_\_

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

Residential address: \_\_\_\_\_

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

Home telephone number: ( \_\_\_\_\_ ) \_\_\_\_\_ Work telephone number: ( \_\_\_\_\_ ) \_\_\_\_\_

Cellphone number: ( \_\_\_\_\_ ) \_\_\_\_\_ Fax number: ( \_\_\_\_\_ ) \_\_\_\_\_

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



#### D: NEW BANK ACCOUNT DETAILS

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

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

Type of account:  Current/Cheque  Transmission  Savings

Name of account holder number: \_\_\_\_\_

Signature of account holder:

SIGN WITHIN THE BOX



*The bank account needs to be in the investor's name.  
A member of our client service team will call you to confirm the change.  
If the investor is a minor, the bank account needs to be in the child's name.  
Payments cannot be made to credit cards and money market accounts.*

#### E: PLEASE SIGN TO CONFIRM THAT THE INFORMATION PROVIDED IS CORRECT

Signature of investor or authorised representative:

SIGN WITHIN THE BOX

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