

- Please send the completed form and documentation to **086 677 0007 (fax)** or [transact@coronation.co.za](mailto:transact@coronation.co.za)
- Should you have any queries kindly call us on **0800 22 11 77** or email [clientservice@coronation.co.za](mailto:clientservice@coronation.co.za)

Expression used herein are defined in the Terms and Conditions for Appointment as Financial Advisory/Adviser (Annexure A).

**A: CORPORATE INFORMATION**

Advisory name: \_\_\_\_\_

Coronation advisory code: \_\_\_\_\_

Registered name of business: \_\_\_\_\_

Trading name: \_\_\_\_\_

FSP license number: \_\_\_\_\_ (Attach a copy of license and annexure detailing the conditions and restrictions)

Income tax number: \_\_\_\_\_ VAT number: \_\_\_\_\_

ID or Passport number (if foreign national): \_\_\_\_\_ (Please attach a copy of your ID or Passport)

Business status:  Sole proprietor/Natural person  Pty (Ltd)  Close corporation  Partnership  Public company

Other specify: \_\_\_\_\_

**B: APPLICABLE PRODUCTS**

The updated information should apply to these products:

<input type="checkbox"/> Local Unit Trust Funds and Tax-Free Investments	Current advisory code: _____	Adviser code: _____
<input type="checkbox"/> International Global Opportunities Funds	Current advisory code: _____	Adviser code: _____
<input type="checkbox"/> Life and Retirement Products	Current advisory code: _____	Adviser code: _____

**C: UPDATE CONTACT DETAILS**

Please update the relevant information:

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

Cellphone number: ( \_\_\_\_\_ ) \_\_\_\_\_ Email address: \_\_\_\_\_

Office postal address: \_\_\_\_\_

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

Office residential address: \_\_\_\_\_

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



If the address has changed, please forward us proof of the new address (bank statement, utility bill or telephone account less than three months old).



### D: UPDATE ADVISER DETAILS



Please complete if there was a change in adviser details

#### Adviser 1

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

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

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

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

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

#### Adviser 2

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

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

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

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

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

### E: UPDATE FUND CHOICE FOR ADVISORY FEE RE-INVESTMENT



Please note that only one fund may be selected:

FUND NAME

All funds listed above refer to the A-Class of the respective funds, except for Bond Fund and Smaller Companies Fund which refer to the R-Class, and Resources Fund and Industrial Fund which refer to P-Class.

### F: UPDATE LOCAL BANK DETAILS

This bank account will be used for advice fees earned on Local Unit Trust Funds, tax free investments and life retirement products.

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

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

Type of account:  Current/Cheque  Savings

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

Signature of investor or authorised representative\*:

\* Please forward proof of authorisation

SIGN WITHIN THE BOX



Proof of new banking details (e.g. bank statement or cancelled cheque less than three months old) are required.  
Payments will not be made to third party accounts, credit cards, money market accounts or bond accounts.



### G: UPDATE OFFSHORE BANK DETAILS

These banking details will be used for Coronation International Funds that are domiciled abroad per the selected products listed in items A (A) 4 of Annexure A detailed on the attached Terms and conditions.

Bank name: \_\_\_\_\_

Bank address: \_\_\_\_\_  
\_\_\_\_\_

Branch/sort code: \_\_\_\_\_ Swift code: \_\_\_\_\_

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

Account number: \_\_\_\_\_ Account currency: \_\_\_\_\_

International bank account number (IBAN): \_\_\_\_\_



Proof of new banking details (e.g. bank statement or cancelled cheque less than three months old) are required.  
Payments will not be made to third party accounts, credit cards, money market accounts or bond accounts.

### H: DECLARATION

I/We

- ▶ hereby consent, where this is applicable to me/us as registered VAT vendor(s), to the use by Coronation of self-invoicing, and confirm that I/we will not issue tax invoices, debit notes or credit notes in respect of the fees payable to me/us by Coronation.
- ▶ warrant the above information to be correct. Coronation shall not be liable for any loss or damage suffered on account of incorrect information provided by me/us or as a result of a change in my/our information or my/our misrepresentation or my/our involvement in any fraudulent act.
- ▶ undertake to advise Coronation in writing should any of the details completed herein change subsequent to signature hereof by me/us.
- ▶ 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)).

Signed at: \_\_\_\_\_ on this \_\_\_\_\_ day of \_\_\_\_\_ year \_\_\_\_\_

1st Signatory: \_\_\_\_\_

SIGN WITHIN THE BOX

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

2nd Signatory: \_\_\_\_\_

SIGN WITHIN THE BOX

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



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**I: NOTES/ADDITIONAL INSTRUCTIONS**