

**MULTILECT RETIREMENT ANNUITY FUND**

FSCA Registration Number: 12/8/28077

SARS Approval Number: 18/20/4/42288

This form is to please be completed in full and sent, together with the **proof of payment**, to the Administrator - Multilect Administrators (Pty) Ltd at the following:

Email [admin@multilect.co.za](mailto:admin@multilect.co.za) or [lorraine@multilect.co.za](mailto:lorraine@multilect.co.za)

**MULTILECT RETIREMENT ANNUITY FUND ADDITIONAL CONTRIBUTION FORM**

**1. INVESTOR DETAILS**

|                            |                      |                |                      |
|----------------------------|----------------------|----------------|----------------------|
| Title:                     | <input type="text"/> | First Names:   | <input type="text"/> |
| Surname / Registered Name: | <input type="text"/> |                |                      |
| Identity / Passport No.:   | <input type="text"/> | Date of birth: | <input type="text"/> |
| E-mail Address:            | <input type="text"/> |                |                      |

| INVESTMENT SELECTION                                                                                                                                              |                      |                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|------------------|
| TO BE MADE IN CONSULTATION WITH THE FINANCIAL SERVICES PROVIDER WITH PARTICULAR REFERENCE TO YOUR RISK PROFILE AS DISCUSSED WITH YOUR FINANCIAL SERVICES PROVIDER |                      |                  |
| Investment Manager                                                                                                                                                | Investment Portfolio | % To be Invested |
|                                                                                                                                                                   |                      |                  |
|                                                                                                                                                                   |                      |                  |
|                                                                                                                                                                   |                      |                  |
|                                                                                                                                                                   |                      |                  |

## 2. LUMP SUM INVESTMENT DETAILS

**Source of Funds:**    Salary ☐    Policy ☐    Donation ☐    Gift ☐    Savings ☐    Investment ☐    Inheritance ☐

[illegible]

|                       |   |  |  |  |  |  |  |  |  |                                             |
|-----------------------|---|--|--|--|--|--|--|--|--|---------------------------------------------|
| Additional investment | R |  |  |  |  |  |  |  |  | (minimum additional investment amount R500) |
|-----------------------|---|--|--|--|--|--|--|--|--|---------------------------------------------|

**Lump sum payments should be made to:**

**Multilect Retirement Annuity Fund**

Bank: **Nedbank (Current Account)**

Branch: Braamfontein

Branch Code: **195005**

Account No.: 1950 398 250

Payment Reference: **Initials & Surname/policy number**

### 3. PROCESSING OF PERSONAL INFORMATION IN TERMS OF THE PROTECTION OF PERSONAL INFORMATION ACT 4 OF 2013

Your privacy is of utmost importance to us. We will take the necessary measures to ensure that any and all information, including personal information (as defined in the Protection of Personal Information Act 4 of 2013) provided by you or which is collected from you is processed in accordance with the provisions of the Protection of Personal Information Act 4 of 2013 and further, is stored in a safe and secure manner and kept for the period prescribed by the applicable laws.

You hereby agree to give honest, accurate and up-to-date personal information which may be used for the following reasons:

- to establish and verify your identity in terms of the applicable laws;
- to enable us to fulfil our obligations in terms of this transaction;
- to enable us to take the necessary measures to prevent any suspicious or fraudulent activity in terms of the applicable laws; and
- reporting to the relevant regulatory authority/body, in terms of the applicable laws.

We may share your information for further processing with the following third parties, which third parties have an obligation to keep your personal information secure and confidential:

- Payment processing service providers;
- merchants, banks and other persons that assist with the processing of any benefit payable;
- Law enforcement and fraud prevention agencies and other persons tasked with the prevention and prosecution of crime;
- Regulatory authorities, industry ombudsmen, governmental departments, local and international tax authorities, and other persons that we, in accordance with the applicable laws, are required to share your Personal Information with; and
- Credit Bureau's.

You acknowledge that any personal information supplied to us in terms of this transaction is provided according to the applicable laws. Unless consented to by yourself, we will not sell, exchange, transfer, rent or otherwise make available your personal information to any other parties and you indemnify us from any claims resulting from disclosures made with your consent. Such personal information provided (voluntarily, unconditionally and specifically) will be utilised by us or by any appointed third parties, on our behalf, and will be kept for such period as legislated according to the applicable laws.

You understand that if we have utilised your personal information contrary to the applicable laws, you have the right to lodge a complaint with Multilect within 10 (ten) days. Should Multilect not resolve the complaint to your satisfaction, you have the right to escalate the complaint to the Information Regulator.

#### **4. INVESTOR DECLARATION**

- a) I confirm that all information provided in this form and all other documents signed by me in connection with this application, whether in my handwriting or not, is correct.
- b) I am responsible for the accuracy and completeness of all answers, statements or other information provided by me or on my behalf.
- c) I have not received advice from the Administrator in respect of this application.
- d) I confirm that the Administrator may accept signed instructions by facsimile or via other electronic means.
- e) By his/her signature hereto the client warrants that he/she has legal capacity to enter into this agreement. If the client is a legal person other than a natural person, the client must furnish Multilect Retirement Annuity Fund with a copy of a resolution confirming that the person signing this agreement on behalf of the client/company is duly authorised to do so.

**Signature of Investor:** \_\_\_\_\_

**Date:** \_\_\_\_\_