

Transfer In Application Form

ETF Tax Free Investment Account

(Issued under Section 12T of the Income Tax Act)
 (To be completed by investors who wish to transfer a tax free investment with another provider to their etfSA ETF Tax Free Investment Account)

NOTE: If you do not have an existing tax free account with etfSA, you must first complete an Application Form for a new account

A) IMPORTANT INFORMATION

1. Please send completed documents to etfSA by:

Email - **TaxFree@etfSA.co.za**
 Fax - 086 692 4543
 Queries - 010 446 0371

2. Value transfers will only be processed upon proof of deposit of funds into the relevant bank account:

Account Name	Account Number	Bank	Account Type	Branch Code
Computershare Nominees (Pty) Ltd ETFIA	282 474 110	Standard Bank	CURRENT	051 001

Note: Use the client's ID Number as the reference

3. Transfer tax certificate information:

Company registration number: **2012/019954/07** Tax number: **9321953177**

4. Computershare (Pty) Ltd is an authorised financial services provider and the Administrator of the ETF Tax Free Investment Account

B) INVESTOR INFORMATION

Client code

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Title Surname

First name(s)

ID Number or Passport (if no RSA ID)

Contact Number Mobile Number

Email Address

C) TRANSFER DETAILS

I hereby request the Administrator to receive my investment as follows:

Full name of current tax free investment provider

Estimated Value of Investment

Full name of Contact Person

Contact telephone number

Contact Email Address

Type of Transfer Value Units*

Please note we will not pay for any charges relating to this transfer. Transfer of units incur a cost of R81.25 per ETF. Value (cash) transfers incur the normal upfront fee of 1% per annum.

***Please attach latest client statement with current investment provider when transferring units.**

