

## PRESERVATION WITHDRAWAL INSTRUCTION

### IMPORTANT INFORMATION

- ? A cancelled cheque or a copy of your bank statement not older than 3 months.
- You may only make one withdrawal from the Preservation Fund.
  - You may either make a full or partial withdrawal.
  - Once you have made a withdrawal you will not be able to access your funds until you reach the retirement age of 55.
  - All withdrawals will be made proportionately across your portfolios.
  - Refer to the latest pre-retirement withdrawal tax tables on the SARS website for information on how your withdrawal amount will be taxed.
  - Once we have applied for a tax directive on your behalf for the withdrawal amount selected, the instruction and the tax directive cannot be cancelled with SARS.

### CUT OFF TIMES

We will only process your instruction once we receive all the required documents. Instructions received before 13:00 (SA time) on a business day will be processed on the same day. Any instruction received after 13:00 on a business day will be processed on the next business day. Instructions in respect of a money market portfolio must be received by 11:00.

### CONTACT US

If you need help with this form, contact us on 021 700 3600 or email [retirement@prescient.co.za](mailto:retirement@prescient.co.za) between 08:00 - 17:00.

### PROVIDE YOUR PERSONAL DETAILS

Which Preservation Fund are you withdrawing from?

Pension Fund

Provident Fund

Membership Number

Full Name

ID or Passport Number (if Foreign National)

Nationality (if Foreign National)

Income Tax Number

Name of Financial Advisor (if applicable)

Do you have a pending / finalised Divorce Order?

Yes  No

In terms of the Divorce Act of 1989, any pension interest due to a non-member ex-spouse must be presented to the Fund.

Do you have a Maintenance Order?

Yes  No

## PROVIDE YOUR BANK DETAILS

South African bank account in the name of the Investor:

Account Holder	<input type="text"/>	Bank	<input type="text"/>
Account Number	<input type="text"/>	Type of Account	<input type="text"/>
Name of Branch	<input type="text"/>	Branch Code	<input type="text"/>

No payments will be made into third party bank accounts (i.e. payment will only be deposited into the bank account of the Investor).

## WITHDRAWAL DETAILS

How much would you like to withdraw?      Full withdrawal       Part withdrawal

Partial amount to be withdrawn before tax      R

If you prefer making a withdrawal that is not proportionate, indicate below which portfolios to withdraw from:

Investment Portfolio	Withdrawal Amount
	R
	R
	R
	R

## AUTHORISATION AND DECLARATION

1. I confirm that all information provided on this form is correct.
2. I have not received advice from the Administrator regarding this instruction.
3. I authorise the Fund to pay the withdrawal proceeds in respect of this completed instruction, subject to the Rules of the Fund and applicable legislation.
4. I have read, understood and agree to the latest Terms and Conditions which I understand may have changed since my original investment.

Investor / Mandate Intermediary	
Signature	<input type="text"/>
Full Name	<input type="text"/>
Signed at	<input type="text"/>
Date	<input type="text"/>