27four Life

ENDOWMENT POLICY

Outright Cession

Important information

This application serves as a request 27four Life to note a cession on this investment. This notice only applies to an outright cession.

27four notes an outright cession by transferring the full units in the Endowment Policy into a new Policy in the name of the cessionary.

Where the Cedent is a natural person, the Cedent may not be:
- Insolvent
- Sequestrated, or in the process of being sequestrated
- Prohibited from ceding this investment in any way

Where the Cedent is a legal entity, the Cedent may not be:
- Under, or in the process of being under, judicial administration
- Liquidated, or in the process of being liquidated

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.

Complete the form and submit documents

Complete all relevant sections of this form and submit it, together with the documents listed below, to retirement@prescient.co.za

- ☐ A clear copy of the South African ID or Passport (if Foreign National) - if the cessionary is an individual
- ☐ A document containing the residential addresss (not older than 3 months) - if the cessionary is an individual
- ☐ A resolution of the trustees or directors appointing authorised signatories, if the cessionary is a trust/company
- ☐ A list of authorised signatories if the cessionary is a bank
- ☐ A resolution of the trustees or directors appointing authorised signatories, if the cedent is a trust/company
- ☐ If applicable, a completed "Acting on Behalf of the Investor form" plus the supporting documents referred to therein

Provide details of the cedent

Policy number/s to be ceded	
Full Name / Name of Entity	
ID or Passport number (if foreign national)	
Name of Financial Advisor (if applicable)	

Marital Status ☐ Single ☐ Married ☐ Divorced

Telephone (H)

Cell

Telephone (W)

Email address

Provide details of the cessionary

Full Name of Cessionary / Registered Name of Entity

Contact person

Street address

C / O

Unit

Complex

Street number

Street

Suburb

City

Postal code

Telephone (H)

Telephone (W)

Postal address

Same as street address YES ☐ NO ☐

C / O

Line 1

Line 2

Line 3

Line 4

Postal code

Fax

Cell

Email address

Provide bank details of the cessionary

South African bank account in the name of the Cessionary:

Account holder

Account number

Name of branch

Bank

Type of

Branch code

Authorisation and declaration

- I confirm that all information provided on this form is correct.
- I have not received advice from the Administrator regarding this instruction.
- I confirm that my appointed financial advisor may have access to my investment details via the secure section of the Administrator's website or via a secure electronic channel at my financial advisor's request.
- I have read, understood and agree to the latest Terms and Conditions which I understand may have changed since my original investment.

Signature of cedent

Full name

Signed at

Date

Signature of cessionary

Full name

Signed at

Date

Signature of spouse

Full name

Signed at

Date