

ENDOWMENT POLICY

Withdrawal Instruction Form

Important information

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

- Attach a copy of your bank statement (if not previously provided or if changed).
- Refer to the Endowment Terms and Conditions to review the rules of this product.
- When the endowment is in the 5 year restriction period, limitations apply to the withdrawal amount.
- Your withdrawal will result in a Capital Gains Tax (CGT) which will reduce the amount received.
- Debit order contributions can only be withdrawn after 32 business days.
- Regular withdrawal payments are scheduled for the 25th of each month. The cut-off for regular withdrawal processing is 10 business days before the withdrawal payment date (i.e. by the 15th of the month).
- The administrator will complete the withdrawal within 10 business days.

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.

Provide your personal details

Policy number	<input type="text"/>
Full name	<input type="text"/>
ID or Passport number (if foreign national)	<input type="text"/>

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	<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

Would you like to make a once off withdrawal? YES NO

Amount to be withdrawn before Capital Gains Tax has been deducted

R

Investment portfolio	Investment portfolio class	Withdrawal amount or percentage

Do you have an existing regular withdrawal? YES NO

Your once off withdrawal may affect your regular withdrawal. How do we treat your regular withdrawal thereafter?
Select one of the options below:

- Regular withdrawal to remain the same
- Cancel withdrawal
- Change regular withdrawal (complete the section below)

- A regular withdrawal can only commence after the restriction period of your policy.
- When you complete this section, all existing withdrawal instructions will be replaced.

Regular withdrawal amount before Capital Gains Tax R

Investment portfolio	Investment portfolio class	Withdrawal amount or percentage

Existing debit order details

Your monthly debit order contribution may be affected by your withdrawal. How do we treat your existing order thereafter?

- Existing debit order to remain the same
- Cancel existing debit order
- Change debit order (A debit order instruction form must be completed to change your debit order)

Spousal consent

The signature of the investor's spouse is required if the investor is married in community of property.

I hereby agree to the withdrawal instructions.

Full name of
spouse

Signature of spouse

Authorisation and declaration

1. I confirm that all information provided on this form is correct.
2. I have not received advice from the Administrator and/or 27four Life regarding this instruction.
3. 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.
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

Full name

Signed at

Date

Signature of Investor or mandate intermediary