

LIVING ANNUITY 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).

You may only withdraw from your living annuity if the market value of your policy is less than or equal to R125 000.

Once we receive your withdrawal instruction and all required documents, we will apply for a tax directive from SARS which may not be cancelled or altered. 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

Full name

ID or Passport
number
(if foreign national)

Provide your bank details

South African bank account in the name of the Investor:

Account holder

Bank

Account number

Type of

Name of branch

Branch code

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

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