


- Initial any amendments made to this instruction.
- Ensure that all information provided is accurate.
- No instruction will be processed unless all requirements have been met.
- The daily cut-off for receipt of instructions is 14h00.
- Forward your instruction to 086 206 4098 or [eflows@coronation.co.za](mailto:eflows@coronation.co.za)
- Should you have any queries regarding this instruction, please contact the Coronation Client Service Centre on 0800 22 11 77.

 As a security measure, a consultant from Coronation will call you to get your personal authorisation to process this instruction.

### A: PRODUCT

- Living Annuity
  Retirement Annuity Fund
  Preservation Pension Fund  
 Preservation Provident Fund
  Endowment Plan

### B: EXISTING DETAILS

Client number: 104104 \_\_\_\_\_ Investment number : \_\_\_\_\_  
 Full name: \_\_\_\_\_  
 ID/passport number: \_\_\_\_\_

### C: NEW DETAILS FOR CHANGE OF NAME AND/OR CONTACT DETAILS

Surname/Company/Trust/Partnership/Close Corporation: \_\_\_\_\_  
 Full name: \_\_\_\_\_  
 Postal Address: \_\_\_\_\_  
 \_\_\_\_\_ Code: \_\_\_\_\_  
 Residential Address: \_\_\_\_\_  
 \_\_\_\_\_ Code: \_\_\_\_\_  
 Home telephone number: ( \_\_\_\_\_ ) \_\_\_\_\_ Work telephone number: ( \_\_\_\_\_ ) \_\_\_\_\_  
 Cellphone number: ( \_\_\_\_\_ ) \_\_\_\_\_ Fax number: ( \_\_\_\_\_ ) \_\_\_\_\_  
 Email address: \_\_\_\_\_

Signature of investor/member or authorised representative\*:  
 \* Please forward proof of authorisation.

SIGN WITHIN THE BOX

Date: \_\_\_\_\_ [d] / \_\_\_\_\_ [m] / \_\_\_\_\_ [y]



#### D: NEW BANK ACCOUNT DETAILS

Bank: \_\_\_\_\_ Account number: \_\_\_\_\_

Branch name: \_\_\_\_\_ Branch code: \_\_\_\_\_

Type of account:      Current       Transmission       Savings

Account holder name: \_\_\_\_\_

Signature of account holder/authorised person:

SIGN WITHIN THE BOX

Date: \_\_\_\_\_ [d] / \_\_\_\_\_ [m] / \_\_\_\_\_ [y]

A cancelled cheque or recent bank statement must accompany this application as confirmation of proof of bank details.

Signature of investor/member or authorised representative\*:

\* Please forward proof of authorisation.

SIGN WITHIN THE BOX

Date: \_\_\_\_\_ [d] / \_\_\_\_\_ [m] / \_\_\_\_\_ [y]

#### E: SUPPORTING DOCUMENTATION

(Copies of the supporting documentation are sufficient as long as all text and photographs are clear and legible).

The following outlines the supporting documentation required in terms of the Financial Intelligence Centre Act No. 38 of 2001 (FICA), as well as other documents required by Coronation to verify details listed in Sections C and D.

Please note that any other information will be independently verified by Coronation.

##### For South African Citizens and Residents

- Change of Name - Copy of new ID document bearing ID number and photograph
- Change of Address - Proof of residential address (e.g. utility bill or telephone account less than 3 months old)
- Change of Bank Details - Proof of banking details (e.g. bank statement or cancelled cheque less than three months old)

##### For Foreign Nationals

- Change of Name - Copy of passport bearing passport number and photograph
- Change of Address - Proof of residential address (e.g. utility bill or telephone account less than three months old)
- Change of Bank Details - Proof of banking details (e.g. bank statement or cancelled cheque less than three months old)