



- Manual clients incur an additional fee (over and above the platform fee) of 0.05%.
- Please note that you will only be able to switch back to online transacting 6 months after your last conversion.
- All distributions are automatically reinvested, net of costs.
- Please note, when you request a 100% switch out or 100% sell from a fund, any distributions due to you from that fund will be paid to your bank account.
- Statements will only be available quarterly, you may contact the client services centre to obtain your latest balance
- The turnaround time for your instruction will be 7 business days from receiving all necessary and completed documentation. Instructions received on public holidays and weekends or after 13:00 on a business day will be deemed to have been received on the following business day.



- View the full list of funds and the Minimum Disclosure Documents (MDD's) with applicable fund minimums and fees, refer to www.satrix.co.za
- The terms and conditions are available on the web ([Terms and Conditions](#))
- If you cannot access the link provided above, this can be obtained from our Client Services Centre or directly from our website www.satrixnow.co.za
- Initial any changes you make on the form.
- The registered investor or authorised signatory must date and sign the form.



Our Contact Details

Please send the completed form and supporting documents to:

E-mail: instructions@satrixnow.co.za
Postal: PO Box 411449, Craighall 2024

Enquiries

Tel 010 020 2250
E-mail: Helpme@satrixnow.co.za
Website www.satrix.co.za



Turnaround Time

24 business hours after receipt of all required information

All required documents must be provided before we can process your instruction.

Initial _____

1. Investor identity information

Satrix Investor Code _____

Title _____ First name(s) / Legal Entity Name _____

Last name _____

Date of birth _____ (ddmmccyy) Country of birth _____

South African identification number _____

OR

Passport (if foreign national): Number _____

Expiry date _____ (ddmmccyy)

Country _____

OR

US Citizens social security number _____

Email address _____

Residential address _____

Country _____

Postal address _____

Only complete if different
from residential address

Postal code _____

Country _____

Contact numbers	International dialling code	Area code	Number
Telephone (<i>work</i>)			
Telephone (<i>home</i>)			
Cell/Mobile		n.a.	

Occupation _____

Self Employed

Yes ☐

No ☐

Initial _____

2. Switch Details

(View our *Minimum Disclosure Documents (MDDs)* on our website www.satrixnow.co.za)

Switch from: Indicate the fund you would like to switch from and the amount you want to switch from each fund

FROM Fund	Rand Value, Units Or %	TO Fund	Rand Value, Units, Or %
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

Switch all future debit order contributions: Yes ☐ No ☐

INCOME DISTRIBUTION PAYMENTS

If you have switched the total investment value of a fund, we will pay out distributions accrued to your bank account.

9. Investor declaration

I / We confirm that I / we:

- have read and understood the important notes, on the first page as well as the terms and conditions.
- have the authority and am / are legally competent to enter into and conclude this transaction, with the necessary legal assistance when it is required.
- are aware that the legal guardian must sign the instruction on behalf of a minor (if applicable).

Signature of investor _____ Date _____ (ddmmccyy)

Authorised signatory* _____ Date _____ (ddmmccyy)

Authorised signatory* _____ Date _____ (ddmmccyy)

*Authorised signatories acting on behalf of the investor (e.g. parents / guardians of a minor and persons authorised to act on behalf of the investor).

Initial _____