

## PERSONAL DETAIL CHANGES

- Initial any amendments made to the application form.
- 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.
- Completed forms are to be faxed to us on 086 677 0007 or e-mailed to [transact@coronation.com](mailto:transact@coronation.com).
- Should you have any queries regarding this application, please contact the Coronation Client Service Centre on 0800 22 11 77 or e-mail [clientservice@coronation.com](mailto:clientservice@coronation.com).



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

**A: EXISTING DETAILS**

Investor number: \_\_\_\_\_

Full name: \_\_\_\_\_

ID/Passport number: \_\_\_\_\_

Company/Trust/Partnership/Close Corporation registration number: \_\_\_\_\_

**B: NEW DETAILS**

## Static details:

Surname: \_\_\_\_\_

Title: \_\_\_\_\_ First name(s): \_\_\_\_\_

Company/Trust/Partnership/Close Corporation registration number: \_\_\_\_\_

Postal address: \_\_\_\_\_

Code: \_\_\_\_\_

Residential address: \_\_\_\_\_

Code: \_\_\_\_\_

Telephone number (home): ( \_\_\_\_\_ ) \_\_\_\_\_ Telephone number (work): ( \_\_\_\_\_ ) \_\_\_\_\_

Fax number: ( \_\_\_\_\_ ) \_\_\_\_\_ Cellphone number: ( \_\_\_\_\_ ) \_\_\_\_\_

Email address: \_\_\_\_\_

## New bank account details:



*If the bank account provided does not match our records, there may be a delay in processing this instruction. To ensure your security, a consultant from Coronation will call you to confirm your personal authorisation.*

Name of account holder: \_\_\_\_\_

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

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

Type of account:  Current  Transmission  Savings



Investor(s) signatures:

Signature of investor (1):

SIGN WITHIN THE BOX

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

Signature of investor (2):

SIGN WITHIN THE BOX

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

### C: 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, as well as other documents required by Coronation to verify details listed in Section B.

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 3 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 3 months old)
- Change of Bank Details - Proof of banking details (e.g. bank statement or cancelled cheque less than 3 months old)

#### For a Company

- Copy of Certificate of Incorporation (CM1) and Copy of Notice of Registered Office and Postal Address (CM22)