



- Please send the completed form and documentation to 086 677 0007 (fax) or transact@coronation.com.
- Should you have any queries kindly call us on 0800 22 11 77 or email clientservice@coronation.com.

A: INVESTOR DETAILS

My Coronation Investor number: _____

Full name: _____

ID/passport number/Company/Trust/Partnership/Close Corporation registration number: _____

Contact telephone (home): (_____) _____ Email address: _____

I am acting on behalf of an investor.

For example, guardians and persons with Power of Attorney or mandate acting on behalf of disabled or insolvent persons.

Full name: _____ ID (or Passport Number): _____

Contact telephone: (_____) _____

Email address: _____

B: SWITCH YOUR INVESTMENT



Before making a decision, please review the comprehensive fact sheets of the different funds on www.coronation.com.

We also recommend that you speak to a financial adviser, who can assess your investment needs.

SWITCH 1

From:

| FUND NAME | Amount | or | % of existing investment |
|-----------|---------|----|--------------------------|
| _____ | R _____ | or | % _____ |

To:

| FUND NAME | Amount | or | % of existing investment |
|-----------|---------|----|--------------------------|
| _____ | R _____ | or | % _____ |
| _____ | R _____ | or | % _____ |
| _____ | R _____ | or | % _____ |
| _____ | R _____ | or | % _____ |

SWITCH 2

From:

| FUND NAME | Amount | or | % of existing investment |
|-----------|---------|----|--------------------------|
| _____ | R _____ | or | % _____ |

To:

| FUND NAME | Amount | or | % of existing investment |
|-----------|---------|----|--------------------------|
| _____ | R _____ | or | % _____ |
| _____ | R _____ | or | % _____ |
| _____ | R _____ | or | % _____ |
| _____ | R _____ | or | % _____ |



SWITCH 3

From:

| FUND NAME | Amount | or | % of existing investment |
|-----------|--------|----|--------------------------|
| | R | or | % |

To:

| FUND NAME | Amount | or | % of existing investment |
|-----------|--------|----|--------------------------|
| | R | or | % |
| | R | or | % |
| | R | or | % |
| | R | or | % |

All funds listed above refer to the A-Class of the respective funds, except for Bond Fund and Smaller Companies Fund which refer to the R-Class, and Resources Fund and Industrial Fund which refer to P-Class.

* Coronation reserves the right to apply additional trading provisions on instructions for the global feeder funds. Refer to General Information and Conditions for more detail. These funds are made available subject to exchange control limits and may be temporarily closed from time to time.

Signature of investor:

SIGN WITHIN THE BOX

Date: _____ [d] / _____ [m] / _____ [y]

C: ARE YOU INVESTING VIA DEBIT ORDER

Please tick the correct option.

My existing debit order remains in place.

Starting from: _____ [d] / _____ [m] / _____ [y] the existing debit order should be transferred to the following fund(s):

| FUND NAME | Debit Order amount |
|-----------|--------------------|
| | R |
| | R |
| | R |
| | R |

The existing debit order should be cancelled.

Debit order authorisation signature:

SIGN WITHIN THE BOX

Date: _____ [d] / _____ [m] / _____ [y]

I/ We warrant that the information contained herein is true and correct, and that I/we have power and authority to enter into and conclude this transaction.



D: REGULAR WITHDRAWALS FROM YOUR INVESTMENT (IF APPLICABLE)

Please tick the correct option.

- The current withdrawal instruction should remain in place.
- The existing withdrawal instruction should be cancelled.
- The current withdrawal instruction should be transferred to these fund(s).

| FUND NAME | Monthly withdrawal amount |
|-----------|---------------------------|
| | R |
| | R |
| | R |
| | R |

E: CHANGE PHASING IN INSTRUCTIONS (IF APPLICABLE)

Please tick the correct option.

- Cancel phase in instructions.
- Do not change phase in instructions.
- Phase in to follow switch instruction.

F: FINANCIAL ADVICE

- I did not receive financial advice about this investment.
- I have received financial advice, but do not require Coronation to pay fees on my behalf.
- I have received financial advice from the financial adviser listed in this section. I instruct Coronation to deduct the following advice fees to pay the adviser on my behalf:

Initial advice fee: _____ % (Negotiable to a maximum 3%, exclusive of VAT). Applied to each deposit and deducted before the investment is made.

Annual advice fee: _____ % per annum of the market value of the investment portfolio, deducted and paid monthly in arrears. (Negotiable to a maximum 1% exclusive of VAT. If an initial advice fee greater than 1.5% is selected, then the maximum annual advice fee is 0.5%.)

This annual advice fee is not part of the normal annual management fee charged by the relevant fund/s. You may revise or terminate financial advice fees by written notice to us.

Signature of investor or authorised signature: _____



G: INVESTOR DECLARATION

I hereby acknowledge that the same terms and conditions that are applicable to my original investment apply to this investment and that I have read the appropriate comprehensive fact sheet information available on Coronation's website (www.coronation.com/za/personal/complete-fund-range-fact-sheets).

Signature of investor/member or authorised signatory:

SIGN WITHIN THE BOX

Date: _____ [d] / _____ [m] / _____ [y]

H: NEXT STEPS

- ▶ Please send the completed form and documentation to transact@coronation.com or 086 677 0007 (fax). A member of our client service team will contact you if more information is required.
- ▶ If we receive and verify all of the required documents before 14:00 (12:00 for the Coronation Money Market fund on any given business day, the transaction will be executed using the same trading day's closing price. You will receive SMS confirmation of the transaction on the next business day.
- ▶ Statements will be sent to you every quarter and all transactions will be confirmed via SMS, email and/or postal letter.
- ▶ Should you have any queries, kindly call us on 0800 22 11 77 or email clientservice@coronation.com

I: NOTES/ADDITIONAL INSTRUCTIONS