

Request to change details form



Contact details

Tel: 0860 67 57 77, PO Box 653574, Benmore, 2010, www.discovery.co.za

How to complete this form

To allow Discovery Invest to process this request:

1. Please make sure the form is completed in full.
2. The instruction must be signed by authorised signatories.
3. Where you need to choose between different options, please mark your selection with an X or use the check boxes on electronic forms.
4. Please initial any changes you make to the form.

Please note the following important information

1. The investment number and effective date of change must be completed at all times.
2. Only details that are being added, changed or deleted need to be completed.
3. No changes will be implemented without the signature of the investor. If the investor authorised the financial adviser to effect changes, the owner of the investment (investor) does not need to sign this form.
4. If the investment is ceded collaterally (in security), no changes will be made without the collateral cessionary's permission. If the investment is ceded absolutely then the new owner must complete the form.
5. Refer to www.discovery.co.za for the relevant FICA documents needed for any of the above changes.

Ways to submit this form

1. Email the completed form to invest_servicing_support@discovery.co.za.
2. Fax the completed form to Discovery Invest on 011 539 5777.
3. Contact your financial adviser.

1. Investor details

Investment number	<input type="text"/>	Title	<input type="text"/>	Initials	<input type="text"/>
Surname	<input type="text"/>				
First names	<input type="text"/>				
ID/passport number	<input type="text"/>				

2. Change of investor details

We require a copy of the investor's ID.

Title	<input type="text"/>	Initials	<input type="text"/>
Surname	<input type="text"/>		
First names	<input type="text"/>		
Date of birth	<input type="text"/> D <input type="text"/> D - <input type="text"/> M <input type="text"/> M - <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y	ID/passport number	<input type="text"/>
Name of company	<input type="text"/>		
Company registration number	<input type="text"/>		

3. Change of investor contact details

Telephone - Cellphone -
Email

4. Change of address

Postal address
 Code

Residential address

Complex/unit/house number
Complex name/estate
Street number
Street name/name of farm
Suburb/district
City/town
Country Code

All communication will be sent electronically to the email address provided unless otherwise indicated. If you prefer to use a postal address, please tick this box

Please consider conserving our planet. We encourage you to choose email as your correspondence preference if you have an email address

5. Change of bank account details for income payments

Accountholder
ID/registration number
Name of bank
Branch name
Account number Branch code
Account type Current Savings Transmission
Signed at (town or city)
Authorised signatory Date - -

- Payment will be done by electronic funds transfer (EFT).
- Payment to a third party will not be allowed.
- Proof of bank account details in the name of the policyholder is required.
- Acceptable proof of bank account details: the proof of account should not be older than three months and can be in the form of a cancelled cheque, stamped letter from the bank or bank statement. Internet statements and bank deposit slips will not be accepted.
- Discovery cannot make payments to a credit card account.
- A clearance period of 45 calendar days for recurring and once-off debit orders applies. Monies collected from a debit order will not be available for withdrawals until the expiry of the 45 days.

6. Change of bank account details for debit orders

Accountholder
Name of bank
Branch name
Account number Branch code
Account type Current Savings Transmission
Preferred debit order date 1st 5th 10th 25th 28th 30th

7. Change of beneficiary nomination

Please complete the details of the nominated beneficiaries you want to change:

First name	Surname	ID number	Relationship to investor	Percentage
				<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
				<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
				<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
				<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
				<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
				<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
				<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
				<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Total:				100%

8. Change of retirement age

New retirement age (from age 55)

Invest Aware

I understand that if I change my retirement age, the benefits on my plan- such as the Retirement Upfront Investment Integrator, the Classic Protectors or the benefits of the Discovery Retirement Optimiser (if applicable) - reduce or fall away completely.

Authorised signatory

Date - -

9. Discovery Miles Integrator

Make a selection from the following options: Transfer Discovery Miles into the Discovery Miles Integrator

Stop the transfer of Discovery Miles into the Discovery Miles Integrator

10. Terms and conditions: Discovery Miles Integrator

- The Discovery Miles Integrator provides a notional fund, the balance of which will be paid into your investment when you reach the age of 65 and provided that you have adhered to the terms and conditions of the benefit.
- The Discovery Miles Integrator is increased when your Discovery Miles are transferred therein.
- You agree that if you have chosen to transfer your Discovery Miles into the Discovery Miles Integrator, Discovery Invest will automatically transfer your Discovery Miles balance (up to a maximum of 1 Discovery Mile for every R10 of your Discovery Investment fund balance) into the Discovery Miles Integrator. You will be able to stop the transfer of Discovery Miles into the Discovery Miles Integrator at any time by logging in to www.discovery.co.za. Once the Discovery Miles have been transferred into the Discovery Miles Integrator, you will no longer have access to them.
- If you chose to transfer Discovery Miles into the Discovery Miles Integrator, the Discovery Miles will be transferred as follows:
 - At the end of February every year, or when so advised by Discovery Invest, your Discovery Miles will be determined by Discovery Card.
 - The Discovery Miles will be applied to the Discovery Miles Integrator Boost table (as defined in your Fact File) where the Discovery Miles transferred will be boosted by Discovery Invest depending on your Vitality status at the time.
- Your Discovery Miles Integrator will increase by a notional R1 for every 10 Discovery Miles transferred.
- The Discovery Miles Integrator will grow in line with your underlying investment portfolios, after the deduction of the fund management fees, Discovery Invest's annual administration fees, and any ongoing financial adviser fees. The Discovery Miles Integrator may be reduced if you have selected the Boost Accelerator, the resulting value pays into your investment at age 65.
- For Discovery Miles to be transferred into the Discovery Miles Integrator, you must have a Discovery Card with the Discovery Miles benefit activated.
- After age 60, you will not be able to transfer Discovery Miles into the Discovery Miles Integrator.
- The Discovery Miles Integrator will not be reduced if you switch out of qualifying Discovery funds before you turn 65.
- Before you reach 65 years of age, these rules apply to the Discovery Miles Integrator:
 - It will reduce proportionately in the case of partial withdrawals.
 - It will fall away entirely if you transfer the fund to another provider. If you die or retire (for any reason), half of the Discovery Miles Integrator will be paid into the fund.

11. Declaration by investor

- This form may only be signed by the investor or authorised representative acting on behalf of the investor with a valid, written proof of authority such as a power of attorney, resolution and/or letters of authority as appropriate, which is/are acceptable to Discovery Invest or the cessionary in an absolute cession.
- Discovery Invest will not be responsible for any loss caused by incorrect information being supplied by the investor or their financial adviser.
- Discovery Invest reserves the right to withhold processing of any unclear, incomplete or ambiguous requests forwarded by the investor.

4. In the event that this form is faxed to Discovery Invest, the responsibility of making sure that the instruction has been received and processed by Discovery Invest will lie with the investor or his authorised representative. A fax confirmation receipt in the hands of the sender will not be regarded as proof that Discovery Invest received a specific document. Please contact Discovery Invest on 0860 67 5777 to confirm receipt of instruction:
 - For debit order instructions where the bank account holder is a third-party individual, a copy of their identity document (ID) and a signature is needed.
 - If the bank account holder is a third-party legal entity, a copy of the resolution of the authorised signatories is needed before any transaction is processed. If banking details are in the name of a company, please attach a company resolution authorising the debit order instruction.
5. If this form is signed on behalf of the investor, the signatory confirms that he/she has authority to do so, that the information is correct in all respects and he/she covers Discovery Invest against any and all damages or loss arising from such event.
6. Discovery Invest will not be responsible in the event that the signatory is not duly authorised and the signatory covers Discovery Invest against any damages or loss of whatever nature arising from such lack of authority.
7. Discovery Invest will not be responsible for any damages or losses of whatever nature because of Discovery Invest's failure to process this instruction because of events beyond the control of Discovery Invest.
8. Discovery Invest will not be held responsible for any loss or damage suffered by the investor because of delays in the processing or rejection of this form for any reason.
9. For the purposes of complying with the Financial Intelligence Centre Act 38 of 2001 ("FICA"), copies of all documents confirming the details changed must accompany this form. Discovery Invest will not be responsible for any loss or damage of any nature arising from the inability of Discovery Invest to process this form where the requirements of FICA have not been complied with.
10. The investor covers and holds Discovery Invest harmless against any loss or damage that the investor may suffer as a result of any act or omission of Discovery Invest which is a result of an obligation imposed on Discovery Invest by any legislation.

12. Signature

Signed at (town or city)

Authorised signatory

Date - -