

**STANLIB Collective Investments Limited** Registration number 1969/003468/06  
 17 Melrose Boulevard Melrose Arch 2196 P O Box 202 Melrose Arch 2076  
 Contact Centre 0860 123 003 Facsimile 0865 297 495  
 E-mail stanlibfspmaintenance@stanlib.com

**STANLIB Wealth Management Limited** Registration number 1996/005412/06  
 Authorised Administrative FSP in terms of the FAIS Act, 2002 (FSP No. 26/10/590)  
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# Financial Adviser: Update of Contract Details

## Broker details

Broker consultant name and user ID	<input type="text"/>	
STANLIB user ID	<input type="text"/>	
Liberty 13 digit code (if applicable)	<input type="text"/>	FSP licence number <input type="text"/>
Brokerage/Company name	<input type="text"/>	
Title (e.g. Mr, Mrs)	<input type="text"/>	
First name	<input type="text"/>	
Middle name	<input type="text"/>	
Surname	<input type="text"/>	
ID number	<input type="text"/>	Date of birth <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
VAT number	<input type="text"/>	Fax number <input type="text"/> - <input type="text"/>
Office telephone number	<input type="text"/> - <input type="text"/>	Mobile number <input type="text"/> - <input type="text"/>
E-mail address	<input type="text"/>	

## Physical address for brokerage

Complex/Unit number	<input type="text"/>
Complex name	<input type="text"/>
Street number	<input type="text"/>
Street name	<input type="text"/>
Suburb	<input type="text"/> Postal code <input type="text"/>
City/Town	<input type="text"/>
Country	<input type="text"/>

## Postal address for brokerage

Select an option below and complete the details:

<input type="checkbox"/> Same as physical address				
<input type="checkbox"/> P O Box number	<input type="text"/>	Post Office name	<input type="text"/>	Postal code <input type="text"/>
<input type="checkbox"/> Private Bag number	<input type="text"/>	Post Office name	<input type="text"/>	Postal code <input type="text"/>
<input type="checkbox"/> Private Suite number	<input type="text"/>	Private Bag No	<input type="text"/>	Post Office name <input type="text"/> Postal code <input type="text"/>

## Change of bank details for brokerage

Proof of banking details in the form of a bank statement or a cancelled cheque is required.

Bank	<input type="text"/>	Branch	<input type="text"/>
Account number	<input type="text"/>	Branch code	<input type="text"/>
Account type	<input type="checkbox"/> Cheque account	<input type="checkbox"/> Transmission account	<input type="checkbox"/> Savings account
Account holder's name	<input type="text"/>		

Signature of account holder/ Authorised signatory	<input type="text"/>	Date	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
		Signed at	<input type="text"/>

**Notes:**

1. This form only applies for the change of details for a financial adviser remaining with the same brokerage. This form is not for transferring clients from one brokerage to another.
2. A certified copy of identity is required for a change in name and surname.

Signature of Financial Adviser	<input type="text"/>	Date	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
		Signed at	<input type="text"/>