



Change of Details

Classic Range

Please note that a complete copy of this form must be sent to STANLIB and the financial adviser must also retain a complete copy. IN TERMS OF THE FAIS ACT, THE FSP THAT DEALT WITH THE CLIENT, MUST DELIVER THE ORIGINAL TO THE CLIENT FOR SAFE CUSTODY. Please use block capitals. Please read the important notes below before completing this form.

Important notes

1. To enable STANLIB to process this form timeously, please ensure that the relevant sections are completed in full and that all required documentation is submitted with this instruction.
2. Please complete the applicable section and provide a copy of the relevant supporting documentation as stipulated in the FICA requirements section to verify the change in details.

Existing investment number

Investor name

Change of personal details

Please refer to FICA Checklist on www.stanlib.com for appropriate proof of change of personal details.

New investor/Investment name

Title New ID no/Registration no

Change of address/contact details

Please refer to FICA Checklist on www.stanlib.com for appropriate proof of change of address.

Physical address Postal code

Postal address Postal code

Email address

Telephone (home) Cellphone

Telephone (work) Fax

Change of bank details

Bank Branch

Account number Branch code

Account type Cheque account Transmission account
 Savings account

Account holder's name

Change of recurring investment details (debit order)

Please refer to point 2 in the declaration section.

Please increase/decrease my debit order from **R** . to **R** .

Please increase/decrease my debit order from **R** . to **R** .

Change of regular withdrawal details

Please tick where applicable

Cancel regular withdrawal
 Last payment on
 - -

Cancel regular withdrawal amount
 Total new amount
R .

New regular withdrawal (where not selected on the application form)
 Total new amount
R .

Frequency Monthly Quarterly Half-yearly Yearly

STANLIB will deduct regular amounts from call account and money market funds first. Thereafter withdrawal amounts will be deducted proportionately from other funds.

Change of annuity income details

On the Classic Linked Life Annuity or Classic Charter Linked Life annuity this can only be done on the anniversary date of the investment. Please refer to point 2 in the Declaration section. (Restricted to between 2.5% and 17.5% per annum)

Change selected percentage from % to %

Change gross annuity amount from **R** . to **R** .

Effective from Date - -

To be paid/changed to Monthly Quarterly Half-yearly Yearly

Change of beneficiary/ies (Applicable to Retirement Annuity, Preservation Pension/Provident Funds and Linked Life Annuity only)

First name	<input type="text"/>		
Surname	<input type="text"/>		
Identity 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"/>
Relationship	<input type="text"/>	Percentage	<input type="text"/> <input type="text"/> %
First name	<input type="text"/>		
Surname	<input type="text"/>		
Identity 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"/>
Relationship	<input type="text"/>	Percentage	<input type="text"/> <input type="text"/> %
First name	<input type="text"/>		
Surname	<input type="text"/>		
Identity 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"/>
Relationship	<input type="text"/>	Percentage	<input type="text"/> <input type="text"/> %
First name	<input type="text"/>		
Surname	<input type="text"/>		
Identity 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"/>
Relationship	<input type="text"/>	Percentage	<input type="text"/> <input type="text"/> %

Where my investment is a Classic Retirement Annuity Fund, Classic Preservation Pension Plan, Classic Preservation Provident plan:

- Although it is my wish to nominate the above dependants/nominees, I understand that this matter shall be dealt with on the instruction of the trustees of the fund in accordance to the pension funds legislation at the time.

