



# MatureLink Plan Loan Repayment

## Structured investments application form

**Please note:** A copy of this form **must** be sent to **STANLIB** and the **Intermediary** must also retain a complete copy of the application. In terms of the **FAIS Act**, the financial services provider that dealt with the **Client** must deliver the original to the **CLIENT** for safe custody.

Investment number

### Client's details

Title   
 First name (if individual)   
 Surname/Name of legal entity   
 Identity/Registration number  Date of birth          
 Telephone  Cellphone   
 Cessionary (if applicable)

### Banking details

First name   
 Surname   
 Intermediary STANLIB ID  Financial consultancy ID   
 FSP licence number   
 Telephone (work)  Fax (work)

### Important notes

- You may only repay the advanced amount as stated on your MatureLink Plan Withdrawal and Loan Form.
- STANLIB reserves the right to call for any additional requirements deemed necessary to protect the interests of both our clients, and STANLIB.
- If the policy is ceded as collateral security, this form must be signed by the cessionary. The Client hereby agrees to provide all documentation and information in terms of the Financial Intelligence Centre Act, No. 38 of 2001, and understands that STANLIB is prohibited from processing any transaction on the Client's behalf until all such documentation and information has been received. (Access the STANLIB website on [www.stanlib.com](http://www.stanlib.com) to view the applicable FICA requirements).
- The Client confirms that neither STANLIB nor any of its representatives provided him/her with any advice and that he/she has taken particular care to consider on his/her own or with the assistance of his/her authorised FSP (financial adviser) whether the repayment is appropriate considering his/her unique objectives, financial situation and particular needs
- **CONFLICTS OF INTEREST DISCLOSURE:** STANLIB shall, wherever possible avoid situations causing a conflict of interest. Where it is not possible to avoid such conflict: STANLIB shall advise the Client, of such conflict in writing at the earliest reasonable opportunity and shall mitigate the conflict of interest in accordance with its Conflict of Interest Management Policy. A copy of this Policy is available on the STANLIB website.  
 STANLIB is part of the Standard Bank Group of companies and both the Liberty Agency and SBFC intermediaries are permitted to sell various STANLIB products. Stonehouse Capital holds equity interests in various FSP's which may result in an unavoidable conflict of interest. Clients of StoneHouse Capital partners, are encouraged to familiarize themselves with the conflict of interest disclosures, as required by their FAIS license, prior to engagement.
- STANLIB is part of the Standard Bank Group of companies and both the Liberty Agency and SBFC intermediaries are permitted to sell various STANLIB products. Stonehouse Capital holds equity interests in various FSP's which may result in an unavoidable conflict of interest. Clients of StoneHouse Capital partners, are encouraged to familiarize themselves with the conflict of interest disclosures, as required by their FAIS license, prior to engagement.

**Please note: in the event of any modification or variation of this standard form STANLIB will regard this form as being invalid and of no force and effect.**

## Repayment options

Repayment of loan  Yes  
 No

Keep the contract in force  Yes  
 No

Loan amount repaid R         -

## Portfolio selection

Please select either percentage or rand amount, please do not select both.

Portfolio name	Percentage switch	Amount
1.	% R	
2.	% R	
3.	% R	
4.	% R	
5.	% R	
6.	% R	
7.	% R	
8.	% R	
Total		% R

## STANLIB's bank account details

Account name: STANLIB  
 Bank: Standard Bank  
 Branch code: 000205 (Johannesburg)  
 Account number: 0000-069-892  
 Reference: Surname and identity number or date of birth

## Investor declaration

The Client hereby agrees to provide all documentation and information in terms of the Financial Intelligence Centre Act, No. 38 of 2001, and understands that STANLIB is prohibited from processing any transaction on the Client's behalf until all such documentation and information has been received (*access the STANLIB website on [www.stanlib.com](http://www.stanlib.com) to view the applicable FICA requirements*).

The Client understands that all material facts must be accurately and properly disclosed and the accuracy and completeness of all information provided by or on behalf of the Client, is the Client's own responsibility. The Client understands that no Intermediary may request the Client to sign any written or printed form or document unless all details required to be inserted thereon by the Client or on behalf of the Client have already been inserted.

Signature of client

Date    -    -

Signed at