



- Please send the completed form and documentation to 086 677 0007 (fax) or transact@coronation.com.
- Should you have any queries or if you would like an investment quote for comparison purposes, kindly call us on 0800 22 11 77 or email clientservice@coronation.com.

! As a security measure, a consultant from Coronation will call you to get your personal authorisation for this instruction. This transfer may attract Capital Gains Tax. We therefore suggest that you consult a financial or tax adviser about the transaction’s implications.

A: INVESTOR DETAILS

My Coronation Investor number: _____

Full name: _____

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

Contact telephone: (_____) _____ Email address: _____

Please indicate whether you would like a 100% or partial transfer: 100% Partial

If you selected a partial transfer please complete the table below:

The investment should be transferred to the recipient listed in Section B.

UNIT TRUST NAME	Unit trust class	Number of units

The investment should be transferred to the recipient listed in Section B.

Debit order instructions (if applicable): Cancel Continue in my name

B: RECEIVING COMPANY DETAILS

Receiving company: _____

Contact person: _____ Contact number: _____

Email address: _____

! Please attach a copy of the instruction or application form submitted to the receiving company.



C: AUTHORISATION/DECLARATION

I/We

- ▶ the undersigned, hereby give notice in terms of the Deed of my/our application to the transfer of the relevant units.
- ▶ warrant that I/we have power and authority to enter into and conclude this transaction.
- ▶ understand that unit trusts operate under different tax rules. They are not taxed on gains derived from selling securities, but they do not enjoy automatic tax exemption. A transfer of units to another legal entity or natural person (other than a spouse) will result in payment of Capital Gains Tax (excluding transfers from the Coronation Money Market Fund).
- ▶ understand that the instruction will only be processed once all supporting documents pertaining to the transfer have been received.
- ▶ understand and agree to the General Information and Conditions which may be amended from time to time. The latest version of this document can be requested from the Client Service Centre on 0800 22 11 77, or viewed on the website www.coronation.com.

Signature of Investor:
(or duly authorised signatory)

SIGN WITHIN THE BOX

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

D: NEXT STEPS

- ▶ To ensure your security, a member of our client service team will contact you to confirm this instruction.
- ▶ 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.
- ▶ Should you have any queries, kindly call us on 0800 22 11 77 or email clientservice@coronation.com.

E: NOTES/ADDITIONAL INSTRUCTIONS