E-mail Lispinstructions@stanlib.com
Facsimile 0867 277 516

Noble Private Portfolios
Independent Asset Managers

STANLIB

Transfer Certificate

STANLIB Linked Investments Tax-Free Savings Plan

(In terms of Section 12T(8) of the Income Tax Act)

SECTION A - INVESTOR DETAILS

TITLE	
FULL NAME	
SURNAME	
TAX REFERENCE NUMBER	
COUNTRY OF TAX REGISTRATION	

SECTION B - RECEIVING PRODUCT PROVIDER DETAILS

RECEIVING PRODUCT PROVIDER NAME	
COMPANY REGISTRATION NUMBER	
TAX REFERENCE NUMBER	
TAX-FREE SAVINGS PLAN PRODUCT NAME	
TAX-FREE SAVINGS PLAN NUMBER	

SECTION C - TRANSFERRING PRODUCT PROVIDER DETAILS

TRANSFERRING PRODUCT PROVIDER NAME	STANLIB WEALTH MANAGEMENT (PTY) LIMITED
COMPANY REGISTRATION NUMBER	1996/005412/07
TAX REFERENCE NUMBER	9220812169
TAX- FREE SAVINGS PLAN PRODUCT NAME	STANLIB LINKED INVESTMENTS TAX-FREE SAVINGS PLAN
TAX-FREE SAVINGS PLAN NUMBER	
CONTACT PERSON	
EMAIL ADDRESS	
CONTACT NUMBER	

TAX FREE SAVINGS PLAN TRANSFER DETAILS

TRANSFER TYPE [ ] UNITS [ ] RAND VALUE TRANSFER AMOUNT: [✔] FULL TRANSFER

VALUE TRANSFERRED (R)

DATE TRANSFERRED DD - MM - YYYY

PAYMENT REFERENCE NUMBER

UNIT TRANSFER DETAILS

Fund (S)	Units transferred	Fund Class	Weighted average cost of transfer

CONTRIBUTION DETAILS ON RECORD WITH THE CURRENT PRODUCT PROVIDER

CONTRIBUTIONS RECEIVED FOR THE CURRENT TAX YEAR ENDING FEBRUARY R .

CONTRIBUTIONS RECEIVED FOR PREVIOUS TAX YEARS ** R .

* * Lifetime contributions less contribution for the current tax year.

ON BEHALF OF TRANSFERRING PRODUCT PROVIDER

- The account transferred out was a Tax Free Savings Plan as defined in Section 12T of the Income Tax Act.
- The above transfer request was processed in terms of the Regulations of Section 12T(8) of the Income Tax Act.

NAME OF REPRESENTATIVE **THINUS BOTHMA**

CAPACITY OF REPRESENTATIVE Head of Strategic Implementation - STANLIB Linked Investments

DATE - -

SIGNATURE

Thinus Bothma

NOTE: Transfer of Tax Free Savings Plan Certificate is required to be retained for a period of 5 years commencing at the end of the year of assessment in which the certificate is issued.