

- 1 Complete 'A'
- 2 Get the receiving product provider to complete 'B'
- 3 Send the completed form to transfers@stash.co.za

A

Investor Details

First name(s)* means compulsory

Surname*

Email address*

South African ID number*

Tax reference number (if applicable)

Acting on Behalf of the Investor

Guardian / person with Power of Attorney acting on behalf of the investor. Proof to be provided. (Additional information can be requested based on business requirements.)

First name(s)*

Surname*

South African ID number*

Relationship to investor*

My signature

Transfer From

Liberty Group Limited
Stash tax-free investment account
Transfer type: Rand value
Transfer amount: Full transfer

Tax free savings account number

Estimated value of transfer (from the Stash dashboard)

This estimated value is subject to any market fluctuations

Transfer To This Product Provider

Make sure that the receiving product provider is expecting a transfer instruction

I hereby request that the above mentioned tax free savings account be transferred to the above receiving product provider.

I confirm that all the information provided above is true and correct.

I fully understand that while my transfer is being processed, I will not be permitted to cash out or continue to contribute towards my Stash tax-free investment.

The estimated transfer value will be subject to any market fluctuations.

The transfer may take up to 10 business days to process.

The transfer will be subject to the receiving product provider accepting this transfer as well as compliance with any legal or regulatory conditions applicable at that time.

The transfer process will only commence once all the required documentation has been received by Liberty and may take up to 10 business days to accept and process. The transfer will use the investment value on the day the transfer is processed.

If I change my mind after the transfer has begun, the transfer cannot be stopped.

I understand that no transfer requests will be allowed to be initiated or processed during the last 10 business days of any tax year, and that I have up to two transfers from Stash for the tax year.

Liberty shall not be held liable for any loss in investment value resulting from any cause beyond the control of Liberty that may prevent it from processing the transfer of this investment.

Liberty is required to share, collect and process your personal information in accordance with our Terms and Conditions and Privacy Statement.

I acknowledge that I understand the implications of this transfer and the Terms and Conditions as contained on this form.

DD / MM / YYYY

Send this form to the receiving product provider to complete 'B'
Then send the completed form to transfers@stash.co.za



TO BE COMPLETED BY THE RECEIVING PRODUCT PROVIDER

Email address
Contact number

transfers@stash.co.za
086 007 8274

Transfer To

Product provider name

Contact person

Company registration number

Email address

Tax reference number

Phone number

Tax free savings account product name

Email address for receipt of tax free savings account transfer certificate (optional)

Tax free savings account number to be transferred into (if applicable)

Banking Details (if applicable)

Bank

Branch code

Account number

Name of account

Branch

Payment reference number

On Behalf Of Receiving Product Provider

The account to be transferred into is a Tax Free Savings Account as defined in Section 12T of the Income Tax Act. We accept the above Tax Free Savings Account transfer and confirm that the above transfer request will be processed in terms of the Regulations of Section 12T(8) of the Income Tax Act.

Name of representative

Capacity of representative

Signature

OR Company stamp

DD / MM / YYYY