



CHANGE OF POLICY STATIC DETAILS

Section 1 – Existing policy details

Name of policy owner _____
 Policy number _____
 Identity / registration number _____
 Contact telephone number _____

Section 2 – Change of policy contact details

Postal address _____
 _____ Code _____
 Primary landline number _____ Fax number _____
 Cellular phone number _____ E-mail address _____

Section 3 – Change in beneficiary nomination

Title	Initials	Surname	Relationship	Identity number or date of birth	Share of benefits
_____	_____	_____	_____	D D M M Y Y Y Y _____	_____
_____	_____	_____	_____	D D M M Y Y Y Y _____	_____
_____	_____	_____	_____	D D M M Y Y Y Y _____	_____
_____	_____	_____	_____	D D M M Y Y Y Y _____	_____
_____	_____	_____	_____	D D M M Y Y Y Y _____	_____
Total					100%

Section 4 – Change of bank account details

Name of account holder _____
 Bank _____
 Branch name _____
 Account type Transmission Savings Current Branch Code _____
 Account number _____ Signature of Account holder _____

Please include a cancelled cheque or recent bank statement on a bank letterhead that is less than 3 months old as proof of bank account details. We can only debit or credit payments from/to South African cheque, transmission and savings accounts.

Section 5 – Mandate to instruct policy changes via fax and scanned document

Please sign and date the mandate below if you prefer dealing with PSG FutureWealth Limited via a signed fax or scanned instruction. We require the original mandate to note this amendment on your policy. Please have this instruction delivered to any of our offices or submit via post to PSG FutureWealth Limited, PO Box 41259, Craighall, 2024.

With my signature hereto I instruct PSG FutureWealth Limited to act on any instruction received for the above-mentioned policy via fax or scanned document if such an instruction contains my signature. I indemnify and hold PSG FutureWealth Limited harmless against all demands, actions and proceedings which may be made against PSG FutureWealth Limited arising out of my election to use the facsimile or electronic mail system in dealing with PSG FutureWealth Limited. I understand that the responsibility to confirm that PSG FutureWealth Limited has received and actioned the faxed request will be mine as policyholder. A telefax confirmation receipt in the hands of the sender will not be regarded as proof that PSG FutureWealth Limited has received the specific document.

Signature/s of policyholder/s _____
(or authorised person)

Date D D M M Y Y Y Y

Section 6 – Additional comments

If you require additional space for comments, clarifications or concerns relative to the above sections, please make such comments here:

Comments on section: _____

Section 7 – Declaration and authorisation

Please read through the following terms, conditions and declarations and assure compliance where applicable.

As a precautionary measure, a copy of the signatory's identity document must be included with this request.

This form may only be signed by the policyholder or duly authorised person acting on behalf of the policyholder. The signatory warrants that he/she has the necessary authority to sign this document, confirms that the information contained in this document is correct and true, and he/she indemnifies PSG FutureWealth Limited against all damages or losses that may arise as a result of his/her signature to this document.

The policyholder confirms that he/she has the approval of his/her spouse where the policyholder was married prior to 1984 and is still married within community of property.

PSG Futurewealth Limited reserves the right to withhold the processing of any request if the information in its opinion is ambiguous, unclear or incomplete. PSG FutureWealth Limited also reserves the right to request additional information or verification documentation from the policyholder if so required. PSG FutureWealth will not be obliged to process this form until such documentation has been received.

PSG FutureWealth Limited will not be liable for any damages or losses of any nature arising out of PSG FutureWealth Limited's failure to action this instruction due to occurrences beyond the control of PSG FutureWealth or as a result of outstanding information or verification documentation from the policyholder or third party.

A faxed or scanned instruction will only be processed if the policyholder has authorised PSG FutureWealth to accept instructions via these mediums on the original change of policy static details form. Where no authorisation has been given, a faxed or scanned instruction will be rejected by PSG FutureWealth Limited. The policyholder is reminded that the responsibility to assure receipt of any instruction by PSG FutureWealth Limited via fax or e-mail remains the responsibility of the policyholder. A telefax transmission confirmation or e-mail delivery advice in the hands of the sender will not suffice as proof that PSG FutureWealth Limited has received the instruction. PSG FutureWealth Limited can not be held responsible for any damages or losses arising out of the election of the policyholder to instruct PSG FutureWealth via fax or e-mail of a scanned document.

I agree by my signature hereto that I have read and understand the terms and conditions contained in this document as well as the standard terms and conditions contained in the original policy document and any endorsements thereto, and agree to be bound to these terms and conditions.

Signed at (place) _____ this day of _____, 2 , 0 , 0 , Y

Signature(s) of legal policyholder (or legal guardian) _____