



**The Home of Retirement Funds**  
For Retirement and Living Annuity solutions

**etfSA RETIREMENT ANNUITY FUND ADDITIONAL CONTRIBUTION FORM  
(Lump Sum Investments)**

Please complete and return to [etfSA.co.za](mailto:etfSA.co.za) at the following addresses: **Email: [rafunds@etfsa.co.za](mailto:rafunds@etfsa.co.za) or Fax: 086 692 4543 or post to: P O Box 36 Cresta, 2118.** If assistance is required in completing this form, please contact us on **010 446 0374.**

**1. INVESTOR DETAILS**

Policy Number:

Title:  First Names:

Surname:

Identity / Passport No.:

Date of birth:

E-mail Address:

**2. etfSA RETIREMENT ANNUITY FUND INVESTMENT OPTIONS**

Please inform us where your funds should be invested. You may elect one or more investment option.

Source of Funds: Salary  Policy  Donation  Gift  Savings  Investment  Inheritance

Other (Please specify):

**Lump sum payments should be made to:**  
**etfSA RA Fund Account**  
 Bank: **First National Bank (Cheque Account)** Account No.: **62713815910**  
 Branch: **RMB Corporate Banking** Branch Code: **204109**  
 Reference: **Your policy number**

*Proof of payment to be submitted together with this form.*

		<b>Lump Sum Amount (Rand) (minimum additional investment: R1 000)</b>										
<b>1.</b>	<b>Wealth Conservator Fund (CPI + 3%)</b>	<table border="1" style="width: 100%; height: 20px;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>										
<b>2.</b>	<b>Wealth Builder Fund (CPI + 5%)</b>	<table border="1" style="width: 100%; height: 20px;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>										
<b>3.</b>	<b>Wealth Enhancer Fund (CPI + 7%)</b>	<table border="1" style="width: 100%; height: 20px;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>										
<b>4.</b>	<b>Wealth Protector Cash Fund</b>	<table border="1" style="width: 100%; height: 20px;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>										
<b>5.</b>	<b>Wealth Default Strategic Asset Allocation Benchmark Fund</b>	<table border="1" style="width: 100%; height: 20px;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>										

**3. INVESTOR DECLARATION**

- a) I confirm that all information provided in this form and all other documents signed by me in connection with this application, whether in my handwriting or not, is correct.
- b) I am responsible for the accuracy and completeness of all answers, statements or other information provided by me or on my behalf.
- c) I have not received advice from the Administrator in respect of this application.
- d) I confirm that the Administrator may accept signed instructions by facsimile or via other electronic means.
- e) I have read, understood and agree to the Terms and Conditions of Membership.
- f) By his/her signature hereto the client warrants that he/she has legal capacity to enter into this agreement. If the client is a legal person other than a natural person, the client must furnish etfSA RA Fund with a copy of a resolution confirming that the person signing this agreement on behalf of the client/company is duly authorised to do so.
- g) I agree to abide by any rules, procedures, standards, requirements or any other conditions that may be established by etfSA RA Fund in connection with the use of its electronic services or any other electronic communication services made available by etfSA RA Fund.

Signed at: \_\_\_\_\_ on this \_\_\_\_\_ day of \_\_\_\_\_ year \_\_\_\_\_

Signature of investor: \_\_\_\_\_