

## Switch Application Form

### ETF Tax Free Investment Account

(Issued under Section 12T of the Income Tax Act)

(To be completed by investors who wish to switch from one security to another within their Tax Free Investment Account)

#### A) IMPORTANT INFORMATION

- Please send completed documents to etfSA by:  
 Email – [TaxFree@etfsa.co.za](mailto:TaxFree@etfsa.co.za)  
 Fax – 086 692 4543  
 Queries – 010 446 0371
- Computershare (Pty) Ltd is an authorised financial services provider and the Administrator of the ETF Tax Free Investment Account

#### B) INVESTOR INFORMATION

Client code

Title    Surname

First name(s)

ID Number or Passport (if no RSA ID)

Contact Number           Mobile Number

Email Address

#### C) SWITCH DETAILS

I hereby request the Administrator to switch securities from my account as follows:

From Portfolio / ETF	To Portfolio / ETF	Rand Amount	Or %	Switch Recurring Payment?	
				YES	NO
				YES	NO
				YES	NO
				YES	NO
				YES	NO
				YES	NO
				YES	NO
				YES	NO
				YES	NO
				YES	NO

Please note that there are no charges, transaction or otherwise, for switches.

For the list of JSE codes, refer to Annexure A.

#### D) TERMS AND CONDITIONS AND INVESTOR DECLARATION

- The terms and conditions applicable to the Investor's investment in this product, as set out in the Application that was completed for investment into this product together with any subsequent amendments, apply to this transaction. The Investor is responsible for ensuring that he/she has read and understand the terms and conditions. A copy of these terms and conditions may be requested from the Administrator.
- The Investor confirms that he/she understand the nature and implications of this transaction and has obtained information relating to the investment that will be made pursuant to this transaction. The Investor confirms that he/she understands the nature and risks associated with such investments. (Product information is available from the Administrator upon request).
- The Investor confirms that all statements made and information provided on this form are correct.
- The Investor acknowledges that before processing the instruction, the Administrator may require the Investor to provide it with information and/or documents, for the purpose of the Financial Intelligence Centre Act, 2001.
- The Investor confirms that he/she has not received any advice from the Administrator.



## ANNEXURE A

### Exchange Traded Funds (ETFs) that qualify for Tax Free Investment Accounts

(should you not wish to use our ETF Tax Free Portfolios)

ETFs that are not registered as Collective Investment Schemes (unit trusts) with the FSB may not be used in tax free accounts. There are currently 66 ETFs listed on the JSE that qualify for investments in tax free accounts.

CIS Compliant ETFs					
JSE Share Code	ETF Name	ETF Provider	JSE Share Code	ETF Name	ETF Provider
<b>Domestic (SA) Equities</b>					
<b>Broad-based large cap</b>					
ASHT40	Ashburton Top 40	Ashburton	STXSWX	Satrix SWIX 40	Satrix
CSEW40	CoreShares EW Top 40	CoreShares	STXRAF	Satrix RAFI 40	Satrix
CTOP50	CoreShares Top50	CoreShares	STAN40	Stanlib Top 40	Stanlib
NFSH40	NewFunds Shari'ah Top 40	ABSA	STANSX	Stanlib SWIX Top 40	Stanlib
GIVISA	NewFunds S&P GIVI Top 50	ABSA	SYGT40	Sygnia/Itrix Top 40	Sygnia Itrix
NFSWIX	NewFunds SWIX 40	ABSA	SYGSW4	Sygnia/Itrix SWIX 40	Sygnia Itrix
STX40	Satrix 40	Satrix			
<b>Sectors</b>					
ASHMID	Ashburton MidCap	Ashburton	STXFIN	Satrix FINI 15	Satrix
GIVFIN	NewFunds S&P GIVI SA Financial	ABSA	STXIND	Satrix INDI 25	Satrix
GIVIND	NewFunds S&P GIVI SA Industrial	ABSA	STXRES	Satrix RESI 10	Satrix
GIVRES	NewFunds S&P GIVI SA Resources	ABSA			
<b>Style / Factors / 'Smart'</b>					
DIVTRX	CoreShares Dividend Aristocrats	CoreShares	NEWFSA	NewFunds NewSA	ABSA
NFEMOM	NewFunds Equity Momentum	ABSA	NFEVAL	NewFunds Value Equity	ABSA
NFEHGE	NewFunds Volatility Managed High Growth Equity	ABSA	NFEDEF	NewFunds Volatility Managed Defensive Equity	ABSA
NFEMOD	NewFunds Volatility Managed Moderate Equity	ABSA	STXDIV	Satrix Dividend Plus	Satrix
NFEVOL	NewFunds Low Volatility	ABSA	STXQUA	Satrix Quality South Africa	Satrix
<b>Domestic (SA) Interest Bearing</b>					
ASHINF	Ashburton Government Inflation	Ashburton	NFILBI	NewFunds ILBI	ABSA
PREFTX	CoreShares PrefTrax	CoreShares	NFTRCI	NewFunds TRACI 3month	ABSA
NFGOVI	NewFunds GOVI	ABSA	STXILB	Satrix Inflation-Linked Bonds	Satrix
<b>Domestic (SA) Listed Property</b>					
PTXSPY	CoreShares PropTrax SAPY	CoreShares	STXPRO	Satrix Property	Satrix
PTXTEN	CoreShares PropTrax Ten	CoreShares	STPROP	Stanlib SA Property	Stanlib
<b>Domestic (SA) Multi Assets</b>					
MAPPSG	NewFunds MAPPS Growth	ABSA	MAPPSP	NewFunds MAPPS Protect	ABSA
<b>International Listed Bonds</b>					
ASHWBG	Ashburton World Government	Ashburton	ETFGGB	Stanlib Global Government	Stanlib
<b>International Listed Property</b>					
AMIRE	AMI Real Estate ex-SA	Cloud Atlas	ETFGRE	Stanlib Global REIT	Stanlib
GLPROP	CoreShares S&P Global Property	CoreShares	SYGP	Sygnia/Itrix Global Property	Sygnia Itrix
<b>International Equities</b>					
AMIB50	AMI Big50 ex-SA	Cloud Atlas	ETF5IT	Stanlib S&P 500 Info Tech	Stanlib
ASHGEQ	Ashburton Global 1200	Ashburton	ETFWLD	Stanlib MSCI World	Stanlib
CSP500	CoreShares S&P 500	CoreShares	SYG4IR	Sygnia Itrix 4th Industrial Revol.	Sygnia
GLODIV	CoreShares Global Dividend	CoreShares	SYGEU	Sygnia Itrix Eurostoxx 50	Sygnia Itrix
STXEMG	Satrix MSCI Emerging Markets	Satrix	SYGUK	Sygnia Itrix FTSE 100	Sygnia Itrix
STXWDM	Satrix MSCI World	Satrix	SYGJP	Sygnia Itrix MSCI Japan	Sygnia Itrix
STXNDQ	Satrix Nasdaq 100	Satrix	SYGUS	Sygnia Itrix MSCI USA	Sygnia Itrix
STX500	Satrix S&P 500	Satrix	SYGWD	Sygnia Itrix MSCI World	Sygnia Itrix
ETF500	Stanlib S&P 500	Stanlib	SYG500	Sygnia/Itrix S&P 500	Sygnia Itrix