

ATM Linking Form

Collective Investments (Unit Trusts)

CLIENT DETAILS

ENTITY ACCOUNT NUMBER	
NAME & SURNAME / ENTITY NAME	
IDENTITY/PASSPORT/REGISTRATION NUMBER	
CELL PHONE NUMBER	

ATM LINKING REQUEST (ONLY AVAILABLE TO STANDARD BANK ACCOUNT HOLDERS)

LINK ALL MY/OUR STANLIB ACCOUNTS
 LINK ONLY THE STANLIB ACCOUNTS SPECIFIED BELOW
 DE-LINK ALL MY/OUR STANLIB ACCOUNTS

Fund Name	Investment Account number

If the account number or the card that you use to access Standard Bank Internet Banking is different from the account details used for ATM banking, please complete below. If the name of the cardholder is not the same as the Investor, a Power of Attorney/Mandate must be attached.

STANDARD BANK CARD NUMBER		(USED FOR INTERNET BANKING)
ACCOUNT HOLDERS NAME		
ACCOUNT TYPE	<input type="checkbox"/> CHEQUE/CURRENT <input type="checkbox"/> SAVINGS	

BANKING DETAILS FOR PAYMENTS

Payments to third party bank accounts are not allowed. Payments can only be paid into an account in the name of the client.

BANK		
BRANCH		BRANCH CODE
ACCOUNT NUMBER		
ACCOUNT TYPE	<input type="checkbox"/> CHEQUE <input type="checkbox"/> SAVINGS <input type="checkbox"/> TRANSMISSION	
ACCOUNT HOLDER'S ID NUMBER		
ACCOUNT HOLDER'S NAME		



TERMS AND CONDITIONS

1. Privacy: It is important to us that you understand how we obtain, process, store, and share your information. This will apply to all the products and/or services which we provide to you, including any products and/or services provided by our affiliates and associates. When you open an investment with us, you give us permission to disclose information for the purposes described herein, including the information of dependents and beneficiaries. You consent to STANLIB collecting, processing, storing, and disclosing this information for the purposes of:

- 1.1. Administering your investment account and processing any instructions on the account.
- 1.2. Communicating with you and your Financial Adviser/ broker.
- 1.3. Providing your information to any entity within Standard Bank Group Limited, including its subsidiaries and affiliates, where you already have a relationship with, or where you have applied for a product or benefit from, such entity. This information will only be shared for the administration of your products or benefits by this entity.
- 1.4. Providing relevant information to a contracted third party who requires the information to provide a service to you for your investment. We will ensure that the third party agrees to keep your information confidential and appropriately secured.
- 1.5. Transferring your Personal Information outside the borders of the Republic of South Africa. We will ensure that anyone to whom we pass on your Personal Information agrees to treat your information with the same level of protection as we do.
- 1.6. Providing information to industry registers such as ASISA, and contracted third parties, such as tracing agents, attorneys, debt collectors and other persons that assist with the enforcement of agreements.
- 1.7. Providing your information to regulatory authorities, governmental departments, local and international tax authorities and other persons that STANLIB under the law have to share your information with.
- 1.8. Payment processing for services providers, merchants, banks and other persons that assist with the processing of your payment instructions.
- 1.9. Assisting law enforcement and fraud prevention agencies and other persons tasked with the prevention and prosecution of crime.
- 1.10. Persons to whom STANLIB cede their rights or delegate their obligations to under agreements.
- 1.11. Conducting research or servicing products. Where appropriate, this information will be de-identified such that it cannot be linked back to you personally.
- 1.12. We undertake solely to collect and process your information as permitted by law. If you feel we have not done so, you have the right to contact us and object.
- 1.13. We will take reasonable steps to ensure that all Personal Information you provided to us is kept secure and confidential.
- 1.14. We will keep your Personal Information until such time as we are compelled to delete it, as prescribed by applicable law.
- 1.15. If we become involved in a proposed or actual merger, acquisition, or any form of sale of assets, we may use and disclose your Personal Information to third parties in connection with the evaluation of the transaction. The surviving company, or the acquiring company in the case of a sale of assets, would have access to your Personal Information, which would continue to be subject to these terms.
- 1.16. You have the right to request a copy of the Personal Information we hold about you. We are allowed to charge you a fee to provide this information to you.
- 1.17. You have the right to request that we update, correct, or delete your Personal Information.

- 2. General**
- 2.1. The terms and conditions signed and agreed to in the Investment Application form will remain in force and apply to this transaction. Refer to your Investment application form for the detailed terms and conditions. Alternatively you can request a copy of the terms and conditions from your Financial adviser or the Contact Centre on 0860 123 003. Alternatively you can request a copy of the terms and conditions from your Financial adviser or the Contact Centre on 0860 123 003.
 - 2.2. The Manager will endeavour to process a change of details instruction within a period of 48-hours, provided that there are no outstanding administrative issues between the Manager and the Client.
 - 2.3. **Electronic Transactions:** the Client agrees that the Manager shall be entitled to implement all instructions and applications of whatever nature received on their Internet site, by telephone or any other electronic medium and which appear to emanate from the Client. The Financial Adviser and/or Manager is indemnified against any losses, claims or damages arising from acting on such instructions and/or applications, notwithstanding that it may later be proved that any such instruction was not given by the Client. The Client agrees that the electronic records of all instructions and applications processed by/or on behalf of him/her or which purport to be processed on behalf of the Client via the Manager's Internet site, telephone or any other electronic medium shall constitute prima facie proof of the contents of such instructions and applications.
 - 2.4. **Query Support and Middle Office:** STANLIB Compliance and Complaints, PO Box 202, Melrose Arch, 2076 Telephone: 0860 123 003.
 - 2.5. **Complaints:** Should the Client wish to lodge a complaint with STANLIB regarding the services being provided, the Client can locate STANLIB's Complaints procedure on www.stanlib.com/contactus/pages/furtherqueries.aspx, alternatively the Client can send an email to rateus@stanlib.com

DECLARATION

We are required to collect, process, store, disclose and share your Personal Information (PI). Your PI is collected and processed by our staff, representatives or third-party contractors and we make every effort to protect and secure your PI. You are entitled at any time to request access to the information STANLIB has collected, processed and shared. I/We agree to provide all documentation and information required in terms of STANLIB's business rules and the Financial Intelligence Centre Act, No. 38 of 2001.

I/We agree to provide all documentation and information required in terms of STANLIB's business rules and the Financial Intelligence Centre Act, No. 38 of 2001, and understand that STANLIB is prohibited from processing any transaction on my/our behalf until all such documentation has been provided.

I/We confirm that all information provided herein is true and correct and that I/We have read and understood the contents of this form.

I/We acknowledge and accept that the information contained in this form and information about the Account Holder may be provided to SARS. Further, that SARS may also exchange the information with the tax authorities of another country or countries in which the Account Holder may be tax resident. **If the information you have provided in this form changes in future, please submit a new form within 30 days. If you are not the Account Holder please indicate the capacity in which you are signing the form. If signing under a power of attorney please also attach a certified copy of the power of attorney.**

SIGNATURE OF CLIENT / AUTHORISED SIGNATORY *		DATE									
		SIGNED AT									
SIGNATURE OF FINANCIAL ADVISER		DATE									
		SIGNED AT									

