BOUTIQUE COLLECTIVE INVESTMENTS

Visio Capital Management (Pty) Ltd

PERSONAL DETAILS / ADDRESS UPDATE
INDIVIDUALS / ENTITY

Boutique Collective Investments (Pty) Ltd administers the BCI unit trusts. It is authorised to do so as a Manager, in terms of the Collective Investment Schemes Control Act. In this document it will be referred to as "BCI"

IMPORTANT INFORMATION

1. This form is to be used by existing investors only
2. Please read the Terms and Conditions that apply to this investment. This is available from your financial adviser, the Client Service Centre or at **www.bcis.co.za**
3. Please fax required documents in checklist below to our Client Service Centre - (011) 263 6152 | email: **instructions@bci-transact.co.za**
   - Proof of new address if address changed ☐
   - Proof of banking details if banking details changed ☐

SECTION 1: CURRENT INVESTOR DETAILS

BCI Entity / Client Account Number

Title

Surname / Entity (e.g company or trust) Name

Name of Investor / authorised contact person

ID or passport number / Registration number

Telephone numbers *Home* *Work*

Mobile

Email address

Residential / Physical / Registered address

Postal Code

Postal address (if different from above)

Postal Code

SECTION 2: UPDATE INVESTOR DETAILS

Information completed below will be updated on our system if different from that which we have on record

Title

Surname / Entity (e.g company or trust) Name

Name of Investor / authorised contact person

Please confirm which contact details you would like us to update: ☐ Home ☐ Work ☐ Mobile ☐ Email

Telephone numbers *Home* *Work*

Mobile

Email address

Please confirm which address you would like us to update: ☐ Residencial ☐ Postal ☐ Both

Residential / Physical / Registered address

Postal Code

Postal address (if different from above)

Postal Code

SECTION 3: CORRESPONDENCE METHOD

We will send you, or the person acting on your behalf, the following types of correspondence:

- Investment statements, tax certificates
- Transaction confirmations when you transact on your account

Please select how you would like to receive these: ☐ Email ☐ Post

SECTION 4: BANKING / PAYMENT DETAILS

Would you like this bank account change to apply to all your recurring debit orders: ☐ Yes ☐ No

Account Holder

Bank

Branch Name | Branch code

Account Number

Account Type ☐ Current ☐ Savings ☐ Transmission

Date for change of bank details to become effective: D D / M M / Y Y Y Y

Please confirm debit order change: ☐ Increase ☐ Decrease ☐ Cancel

R

Effective date D D / M M / Y Y Y Y

Date D D / M M / Y Y Y Y

Signature of investor(s) or legal guardian

CONTACT DETAILS

Physical Address
Boutique Collective Investments
Unit AC13, Ground Floor Acorn House,
Old Oak Office Park
Cnr Old Oak Road & Durban Road
Bellville
7530

Contact us
Tel: +27 (0)21 007 1500/1/2 | Fax: +27 (0)86 502 5319 | Email: **clientservices@bcis.co.za**
Visit our webiste: **www.bcis.co.za**

Should you have any complaints, please send an email to ***complaints@efgroup.co.za***

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