



APPLICATION FOR INVESTMENT

If you are new to Fedgroup, pleas APPLICATION FORM.	se sign up via our Fedgro	oup App or complete a	CLIENT or IN	STITUTION	IAL
Client ID number/Registration n	umber		Fedgrou	up number	
			FG		
Surname/Registered name			Initials		
	Lump sum (R)	Recurring (R)	Annual Esc (%)	Advisor fee (upfront)	Advisor fee (annual)
Secured Investment	Min R5 000 per investment			Max 3%	Max 1.5%
Tax-Free Savings Account	Min R5 000 per investment	Min R500 per investment		Max 3%	Max 1%
Money Market Fund Unit Trust	Min R5 000 per investment	Min R500 per investment		Max 3%	Max 1.5%
Income Plus Fund Unit Trust	Min R5 000 per investment	Min R500 per investment		Max 3%	Max 1.5%
General Equity Fund Unit Trust	Min R5 000 per investment	Min R500 per investment		Max 3%	Max 1.5%
Large Cap Equity Fund Unit Trust	Min R5 000 per investment	Min R500 per investment		Max 3%	Max 1.5%
Worldwide Flexible Fund Unit Trust	Min R5 000 per investment	Min R500 per investment		Max 3%	Max 1.5%
Endowment: Impact Portfolio	Min R100 000 per investment	Min R3 000 per investment		Max 3%	0.5% + Max 0.5%
Endowment: Diversified Alternates Portfolio	Min R100 000 per investment	Min R3 000 per investment		Max 3%	0.5% + Max 0.5%
Payout: Secured Investment Interest Unit Trust Recurring Withdrawal	Rand	Percentage			
Please confirm how you will be the investor is not the payer, please compared as *EFT Debit Order Please provide proof of payment. Source of funds		n on page 2. late DD MM		ring collect	
Savings Bonus	Inheritance S	Salary Someone	else Othe	ər	
nvestor's bank account details:					
nvestor's bank account number ABSA Capitec	FNB Nedbanl	k Standard Ban	ık Other		
Financial advisor's code			Initials		
acknowledge that all the inform he important information referre			accurate and	that I have	e reviewed
INVESTOR'S/AUTHORISED SIGN.	ATURE	Date DD MM	YYY	Y	
Fedgroup Financial Holdings (Pty) Ltd. is a license E investments@fedgroup.co.za	ed controlling company.				

FEDGROUP/FED0484 - APPLICATION FOR INVESTMENT_V9.1 - SEPTEMBER 2025



PAYER'S DETAILS:

Only required if the payer is not the investor. Not applicable to Living Annuity.						
Surname						
First name (s) Date of birth						
ID number/passport number (if foreign national) Cell number						
Email						
Source of funds:						
Savings Bonus Inheritance Salary Other						
Payer's bank account details for collection. Not applicable to Living Annuity.						
Payer's bank account number						
*EFT Debit Order						
Lump sum collection date DD MM Recurring collection date DD Recurring collection MM						
*Please provide proof of payment.						
ABSA Capitec FNB Nedbank Standard Bank Other						
I acknowledge that all the information provided is accurate and that I have reviewed the important information referred to in this document.						
PAYER'S/AUTHORISED SIGNATURE Date D D M M Y Y Y Y						

LEGAL STUFF

Dotting your i's and crossing your t's. We have gathered all the important elements relating to our products here. To make it easy for you to familiarise yourself with this information, we have provided a summary of this below.

For the full version of our Legal Stuff, please visit www.fedgroup.co.za/Legal-Stuff or scan the QR code on the right.



TERMS AND CONDITIONS

Ts and Cs are the norm with most providers. In order to help you understand exactly what our offering is and how we deliver it, we've put together comprehensive terms and conditions to ensure that our stakeholders are not prejudiced by individuals looking to manipulate any unforeseen loopholes.

DECLARATION

In the financial services space, we need confirmation of the information you have provided and the information provided to you. This section houses all the relevant declarations.

POPIA

Ever wondered what happens to your information after you have provided it, or why you have to provide certain types of information? In this section we explain what we do with your data and outline how it is used by all the companies within our broader group. Fedgroup and its activities fall under the provisions of the Protection Of Personal Information Act.

DEBIT ORDER MANDATE

We never take anything without permission. This even applies when you tell us to collect funds from your account. The debit order mandate ensures that we have the necessary permission to do so.

FICA

We need to make sure that you are who you say you are, just like those websites that ask you to identify all the images with stop signs in them. Only, this is a pretty serious security matter driven by the Financial Intelligence Centre Act. While it can be time consuming, we've made it super simple via the Fedgroup App!

BANKING DETAILS

Unfortunately, we're not allowed to publish our banking details on public forums, but we'll send the relevant details to you once we've got your investment application.