

Wealth Namibia Withdrawal

Investment number	P	P																	
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Important information:

1. This request forms part of your investment agreement with us. Refer to the terms of your investment to make sure you can make a withdrawal on your investment, or ask your financial adviser for more information.
2. According to the Financial Intelligence Act (FIA), 13 of 2012, we must identify you, and verify information if it is new or different to what we have on our records. Based on the information you provide, we may ask for additional information and documents.
3. We populated certain fields on this form to guide you. You can change these fields according to your requirements.
4. You may not change any other part of this form. When you correct any information you have completed, sign next to it.
5. If the investment has been ceded, the cessionary must sign this request.
6. If we cannot process any part of this request, we will inform you or your financial adviser.

1: Investor details

1.1 Personal details

Surname or name of legal entity																															
Previous surnames or entity names																															
Title					Initials																										
Full name																															
Identity/Passport/Registration number																															
Cell phone number	+ 2 6 4															Other	+ 2 6 4														
Email address																															
Tax reference number																															

2: My withdrawal request

When we collect your investment amount (electronic lump-sum collections or regular investment debit order collections) we can only withdraw, refund or make income drawdown payments after 30 calendar days. This does not apply to electronic fund transfers (EFTs) to our bank account.

If this is a partial withdrawal, make sure that the amount remaining in your investment is within the product minimum limits.

Namibia Direct Investment:

The minimum withdrawal amount is N\$250.

Namibia Flexible Investment:

The minimum withdrawal amount is N\$2 500.

Namibia Retirement Preservation Fund:

During the first 3 years of joining the fund, you can make withdrawals (partial or full) at any time. These withdrawals may be subject to income tax. We will request a tax directive from the Namibia Revenue Agency (NRA) and deduct any applicable tax from the withdrawal amount before we pay you. You will not be able to cancel or change the withdrawal request after we request a tax directive from the NRA.

Type of instruction	Partial withdrawal					Or	Full withdrawal				
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Complete the relevant section below:

4. I acknowledge that the client(s) is/are not a resident, national or citizen of the United States of America and is/are not a US person within the meaning of the definition of that term contained in Regulation S of the US Securities Act 1933 (as amended).
5. Any request I give you will be within the limits of the mandate I have from the investor.

I have read this application form, the terms and guides that apply to this investment. The information on this form is, to my knowledge, true and correct. I will not hold you liable for any loss or damage if this application is changed after I sign it.

Signature of financial adviser	<input style="width: 95%; height: 30px;" type="text"/>	Date	<table border="1" style="border-collapse: collapse;"> <tr> <td style="width: 15px; height: 15px;">D</td> <td style="width: 15px; height: 15px;">D</td> <td style="width: 15px; height: 15px;">M</td> <td style="width: 15px; height: 15px;">M</td> <td style="width: 15px; height: 15px;">Y</td> <td style="width: 15px; height: 15px;">Y</td> <td style="width: 15px; height: 15px;">Y</td> <td style="width: 15px; height: 15px;">Y</td> </tr> </table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y				

5: Investor declaration

1. I am the owner of this investment.
2. It is my responsibility to get advice before making any investment decisions. I accept the risks related to this investment if I choose not to use the services of a financial adviser or do not follow my financial adviser's advice.
3. I know that my financial adviser must be appropriately registered under the Long Term Insurance Act whereas Investment Manager are registered under Determination 4(1)(f) of the Stock Exchange Control Act.
4. I understand and accept:
 - that you are not liable for any claim that may arise as a result of this request;
 - your timelines, business practices and administrative processes; and
 - that you can share my personal information within Momentum Metropolitan Namibia Limited, its subsidiaries and contracted service providers in order to administer my investment and provide me with financial wellness information.
5. I am aware that the Financial Intelligence Act (FIA) applies and I will follow its requirements.
6. I am not, nor am I acting on behalf of a person who is either a resident, national or citizen of the United States of America or a US person within the meaning of the definition of that term contained in Regulation S of the US Securities Act 1933 (as amended).
7. I acknowledge that you may be required to send the information provided to the Namibia Revenue Agency, who may share it with the local tax authority according to the Organisation for Economic Co-operation and Developments (OECDs) Common Reporting Standard (CRS)
8. I undertake to inform you in writing of any changes in my circumstances or details that I provided within 30 days of any change.

I have carefully read, and I understand and accept this application form, the terms and guides that apply to this investment. The information I completed on this form is true and correct. I will not hold you liable for any loss or damage if this request is changed after I sign it.

Name and surname	<input style="width: 95%; height: 20px;" type="text"/>										
If not the investor, capacity of signatory	<input style="width: 95%; height: 20px;" type="text"/>										
Signed at	<input style="width: 35%; height: 20px;" type="text"/>	Date	<table border="1" style="border-collapse: collapse;"> <tr> <td style="width: 15px; height: 15px;">D</td> <td style="width: 15px; height: 15px;">D</td> <td style="width: 15px; height: 15px;">M</td> <td style="width: 15px; height: 15px;">M</td> <td style="width: 15px; height: 15px;">Y</td> <td style="width: 15px; height: 15px;">Y</td> <td style="width: 15px; height: 15px;">Y</td> <td style="width: 15px; height: 15px;">Y</td> </tr> </table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y				

Authorised signatory		Other signature if required
<input style="width: 95%; height: 30px;" type="text"/>		<input style="width: 95%; height: 30px;" type="text"/>

Contact details

Client contact centre

Telephone: (+264) 61 297 3737, Fax: (+264) 61 297 3679, Email: wealthservice@momentum.com.na

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Momentum Wealth Namibia (Pty) Ltd, an authorised financial services provider Reg no 2016/0297
Momentum Metropolitan Namibia Limited, an authorised financial services provider Reg no 89/327
 Directors: GD Marais, JA Ipinge, JJ Comalie, LCC Rankin