

# Voluntary Investment Product

## Declaration of Executor / Authorised Person

### A Important Information

	<b>Make an Informed Decision</b>	<ul style="list-style-type: none"> <li>The Financial Intelligence Centre Act 38 of 2001 as amended requires accountable institutions to verify the identity of their clients, and the South African Revenue Service (SARS) requires all financial service providers to collect tax information from their clients.</li> <li>Capitalised terms in this document are defined in the <b>Terms and Conditions</b>.</li> </ul>
	<b>Complete the Form</b>	<ul style="list-style-type: none"> <li>This form must be completed by the appointed executor(s) and, if applicable, any authorised representative(s).</li> </ul>
	<b>Submit the Documents</b>	<ul style="list-style-type: none"> <li>Please submit this form together with the FICA and supporting documents listed above to: <a href="mailto:lifecycle@thecycle.co.za">lifecycle@thecycle.co.za</a></li> </ul>
	<b>Contact Us</b>	<ul style="list-style-type: none"> <li>If you have any queries, please contact us on/at:</li> <li><b>Email:</b> <a href="mailto:lifecycle@thecycle.co.za">lifecycle@thecycle.co.za</a></li> <li><b>Website:</b> <a href="https://thelifecycle.co.za/">https://thelifecycle.co.za/</a></li> </ul>

### B Deceased Investor Details

Account Number/s:

### C Executor / Authorised Person Personal Details

Please indicate your role, and complete the form below:

		Executor	Authorised Representative
Title:	Specify:	First Name(s):	
Surname:			
Date of Birth:	dd mm yyyy	Country of Birth:	
Citizenship:		Identity Document No:	

Please refer to the Terms and Conditions if you are unsure as to how to answer the question below.

Are you a domestic prominent influential person or a foreign prominent public official? Yes No

If yes, please specify:

### D Executor / Authorised Person Contact Details

Home Phone: Cell Phone:

Work Phone: Email:

Home Address: Post Code:

Postal Address: Same as Home Address Or: Post Code:

## E Authority to Transact on the Deceased's Investments

- This section needs to be completed by the **appointed executor(s) only**.
- If more than one executor is appointed by the Master of the High Court, please tick the relevant box below.
- Secure transactional online access can only be granted to the appointed executor(s) on discretionary products.

**Each executor may act independantly, or**

- If this option is selected, each executor may transact and sign instructions independently once consent is received from all the executors. If each executor is allowed to transact independently, we will require all executors to sign the declaration section.

**The co-executors must act jointly**

- If this option is selected, all executors are required to sign instructions and **view-only online access** will be allowed for each executor.

If you do NOT want online access, please check this box:

## F Declaration of Executo or Authorised Person

Please sign the declaration below:

- Under penalties of perjury, I declare that all information provided in this form, whether in my handwriting or not, is correct and that I am responsible for the accuracy of the information provided.
- If more than one executor was appointed by the Master of the High Court, and if each executor may act independently, I am aware that instructions may be carried out on the deceased account(s) without the knowledge and/or approval of the other executor(s).
- I authorise LifeCycle Investments to accept instructions submitted via the secure section of the LifeCycle Investments website and waive any claim that I may have against LifeCycle Investments. I indemnify LifeCycle Investments against any loss incurred as a result of LifeCycle Investments receiving and / or acting upon such instructions.
- I consent to the Administrator processing my personal information according to the Terms and Conditions.
- I have read and understood the latest Term and Conditions.

Executor's Signature:

Date: dd mm yyyy

Each co-executors' signatures below:

Co-executor's Signature:

Date: dd mm yyyy

Co-executor's Signature:

Date: dd mm yyyy

Co-executor's Signature:

Date: dd mm yyyy

## H Additional Information

- LifeCycle Investments Proprietary Limited ("**LifeCycle Investments**" / "**the Administrator**", registration number: 2022/666528/07) is an authorised FSP (number: 52896). LifeCycle Investments is authorised by the Financial Sector Conduct Authority ("**FSCA**") to provide advice, intermediary services, and administrative services. For full details on the sub-categories for which LifeCycle Investments is licensed, please visit: [https://www.fsca.co.za/faqs/search\\_fsp.htm](https://www.fsca.co.za/faqs/search_fsp.htm)
- LifeCycle Investments is located at 13 Moquini Coastal Estate, Danabaai, Mosselbaai, Western Cape, 6510, and can be contacted via our website: <https://thelifecycle.co.za/>, by phone on: 0716289722, by email at: [lifecycle@thecycle.co.za](mailto:lifecycle@thecycle.co.za), or by post at the physical address provided above.
- Your Selected Investment Option(s) will be registered in the name of LifeCycle Nominees (RF) Proprietary Limited ("**LifeCycle Nominees**" / "**the Nominee**", registration number: 2022/666540/07), which is approved by the FSCA as a nominee company to hold client assets. For full details please visit: <https://www.fsca.co.za/MagicScripts/mgrqispi.dll?APPNAME=Web&PRGNAME=Nominees>.