



## ENDOWMENT POLICY - OUTRIGHT SESSION

### IMPORTANT INFORMATION

This application serves as a request for 27four Life to note an outright cession on this investment.

Where the Cedent is a natural person, the Cedent may not be:

- Insolvent
- Sequestered, or in the process of being sequestered
- Prohibited from ceding this investment in any way

Where the Cedent is a legal entity, the Cedent may not be:

- Under, or in the process of being under, judicial administration
- Liquidated, or in the process of being liquidated
- Prohibited from ceding this investment in any way.

### COMPLETE THE FORM AND SUBMIT DOCUMENTS

Complete all relevant sections of this form and submit it, together with the documents listed below, to [lifecycle@thecycle.co.za](mailto:lifecycle@thecycle.co.za) or fax to 071 628 9722.

- A clear copy of your South African ID or Passport (if Foreign National) of the investor or authorised signatories and trustees
- A document less than three months old containing the residential address of the investor or entity
- A cancelled cheque or a copy of your bank statement of the investor or entity
- A resolution of trustees / directors appointing authorised signatories, if Cedent is a company / trust
- A list of authorised signatories, if Cessionary is a bank
- ? If applicable, a completed "Acting on Behalf of the Investor form" plus the supporting documents referred to therein

### CUT OFF TIMES

Instructions received before 13:00 (SA time) on a business day will be processed on the same day. Any instruction received after 13:00 on a business day will be processed on the next business day. Instructions in respect of a money market portfolio must be received by 11:00.

### CONTACT US

If you need help with this form, contact us on 071 628 9722 or email [lifecycle@thecycle.co.za](mailto:lifecycle@thecycle.co.za) between 08:00 - 17:00.

### PROVIDE DETAILS OF THE CEDENT

Policy Number/s to be ceded	<input type="text"/>		
Full Name / Name of Entity	<input type="text"/>		
ID or Passport Number (if foreign national)	<input type="text"/>		
Name of Financial Advisor (if applicable)	<input type="text"/>		
Marital Status	Single <input type="checkbox"/>	Married <input type="checkbox"/>	Divorced <input type="checkbox"/>
Telephone	<input type="text"/>	Fax	<input type="text"/>
Email Address	<input type="text"/>	Cell	<input type="text"/>

**PROVIDE DETAILS OF THE CESSIONARY**

Full Name of Cessionary / Registered Name of Entity

Contact Person

Street Address  Postal Address

c/o  Same as Street Address Yes  No

Unit  c/o

Complex  Line 1

Street Number  Line 2

Street  Line 3

Suburb  Line 4

City  Postal Code

Postal Code  Country

Country

Telephone  Fax

Email Address  Cell

**PROVIDE BANK DETAILS OF THE CESSIONARY**

South African bank account in the name of the Cessionary:

Account Holder  Bank

Account Number  Type of Account

Name of Branch  Branch Code

**AUTHORISATION AND DECLARATION**

- I confirm that all information provided on this form is correct.
- I have not received advice from the Administrator regarding this instruction.
- I confirm that my appointed financial advisor may have access to my investment details via the secure section of the Administrator's website or via a secure electronic channel at my financial advisor's request.
- I have read, understood and agree to the latest Terms and Conditions which I understand may have changed since my original investment.

	Cedent	Cessionary
Signature	<input type="text"/>	<input type="text"/>
Full Name	<input type="text"/>	<input type="text"/>
Signed at	<input type="text"/>	<input type="text"/>
Date	<input type="text"/>	<input type="text"/>