

Investo personal information form

Contract number

Important

1. We require the information below to ensure the accuracy of the personal data that we maintain about you for the contract(s) you hold with Momentum Metropolitan Life Limited (Momentum). You may access your personal information in our possession and may ask us at any time to update it.

2. Please attach a clear copy of your valid identity document (SA identity document, foreign passport or both sides of the SA smart identity card).

3. Based on the information you give us, we may ask for additional information and documents.

4. The Organisation for Economic Co-operation and Development (OECD) allows for the efficient exchange of information between member countries. We have to ask for the investment owner/fund member and other role players' country of residence and related tax information. If you represent a trust or entity, we need the *Self-certification form for entities* (Service065). For other countries' country codes, please use the *List of country codes* (Service052). It is available from your financial adviser or [momentum.co.za](https://www.momentum.co.za).

5. **Protection of Personal Information Act (POPIA), 4 of 2013.**
The person providing the personal information confirms that they have the consent of the party/parties whose personal information is given. We use the personal information to issue and administer this contract, and we do it in accordance with POPIA legislation. For more information on how we treat personal information, please visit: <https://www.momentum.co.za/momentum/support/privacy-policy>.

1. Personal details

Surname

Title

Full names (as on identification document)

Identification type

Identity document

Passport

Country of issue

Identity/Passport number

Date of birth

Issue date of passport

Expiry date of passport

Country of birth

Z

A

(ZA if South Africa)

Citizenship

Z

A

(ZA if South Africa)

If you hold dual citizenship, give the other country code

Cell phone number

+27(0)

Email address

Physical address

Postal code

2. Tax information

Are you a tax resident in South Africa (SA)?

Yes

No

If "yes", give your SARS tax number

Is SA your primary tax residence country?

Yes

No

Do you have foreign tax residency?

Yes

No

If you have foreign tax residency, complete the table below.

Tax residence (country code)	Tax residence (country)	Tax identification number (TIN) or equivalent	Primary tax residence country	Non-TIN registration reason* (if applicable)
			☐	A/B/C
			☐	A/B/C
			☐	A/B/C

*The reason for not being TIN registered:

A The country/jurisdiction does not issue TINs to its residents (does not apply to South Africa or the United States).

B The investor is not required to be registered for tax (even though income tax is levied by the jurisdiction).

C TIN is not required to be reported by such jurisdiction under local law (does not apply to South Africa or the United States).

3. Declaration

1. The information I give is true and correct. I made sure that all details of this form were completed. I will not hold Momentum ("you") liable for any loss or damages if someone changes this form after I have signed it.
2. I am aware that the Financial Intelligence Centre Act (FICA) applies and I will comply with its requirements.
3. If I am an individual natural person, I certify that I confirm and guarantee that I hold no other citizenships and residencies for tax purposes, other than those disclosed on this application form. If this changes, I will inform you in writing of any change within 30 days of the change occurring. If I represent an entity, I will complete, sign and attach the *Self-certification form for entities* (Service065) to this application form.
4. I acknowledge that you may be required to send the information provided in section 1 to SARS, who may share it with the local tax authority according to the Foreign Accounts Tax Compliance Act (FATCA) and the OECD Common Reporting Standard (CRS).
5. I agree that you can share my personal information with Momentum Metropolitan Group Limited, its subsidiaries and contracted service providers to administer my contract properly.
6. I will let you know if my information changes.

Signed at															
Signature of client							Date	D	D	M	M	Y	Y	Y	Y

Contact details

Client contact centre

ShareCall: 0860 664 321, Telephone: +27 (0)11 505 1800, Email: investo@momentum.co.za

Address: 268 West Avenue Centurion, 0157 Website: momentum.co.za

Momentum Metropolitan Life Limited

Momentum is part of Momentum Metropolitan Life Limited, an authorised financial services and registered credit provider. Reg no 1904/002186/06

Refer to the company websites for directors and company secretary details momentum.co.za momentumgrouppltd.co.za