

## Satrix Retirement Plan General Maintenance Form

### Important information

- This form is used for any changes to the details below on our records.
- Complete this form in block letters.
- Always indicate your plan- or portfolio number.
- If you request an address change, we need proof of your new address (eg. telephone account, municipality account, etc.), not older than 3 (three) months. Your name and physical address must reflect on this account.
- For change of surname we require a copy of your identity document and marriage certificate.
- No third party bank details will be accepted.
- This request will only be processed if signed by the member or authorised person and completed in full. Glacier will not be held responsible for damages and/or losses sustained by the member due to incomplete,

- ambiguous or incorrectly completed forms or failure to adhere to these procedures.
- Persons acting on behalf of a member must provide proof of appointment (power of attorney, letters of executorship, etc.). Only applicable if not already in Glacier's possession.
  - Please mark the appropriate block(s) with an X.

### Send documents to

Glacier Financial Solutions  
E-mail: [satrixrp@glacier.co.za](mailto:satrixrp@glacier.co.za)  
Fax: 021 947 9210

### Contact us for more information

- Phone our Client Contact Centre at: 0860 007 461
- Send an e-mail to: [satrixrp@glacier.co.za](mailto:satrixrp@glacier.co.za)

### 1. Personal details of Member (All fields are compulsory)

Investment plan- or portfolio number

Title: \_\_\_\_\_ Surname: \_\_\_\_\_

Full first names of member/Initials and surname of contact person and designation:

Income tax reference number     /     /

Nationality: South African  Other (please specify)

Identity or passport number/Registration number of entity

Passport country of issue/Country of entity registration

Physical address: \_\_\_\_\_

\_\_\_\_\_ Postal code: \_\_\_\_\_

Postal address (if different from physical address): \_\_\_\_\_

\_\_\_\_\_ Postal code: \_\_\_\_\_

Telephone number (code first) (h): ( \_\_\_\_\_ ) \_\_\_\_\_ Telephone (w): ( \_\_\_\_\_ ) \_\_\_\_\_

Cell: \_\_\_\_\_ Fax: ( \_\_\_\_\_ ) \_\_\_\_\_

E-mail: \_\_\_\_\_

#### Glacier Financial Solutions

Glacier Place, 1 Sportica Crescent, Tyger Valley 7530  
Private Bag X5, Tyger Valley 7536

Glacier is a licensed Financial Services Provider

SATRP General Maintenance  
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