



Financial Advisor Form

For Individuals &
Legal Entities

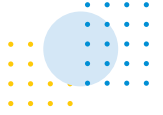
Bridge Collective Investments (RF) (Pty) Ltd administers the unit trusts and is authorised to do so under the Collective Investment Schemes Control Act. It shall be referred to as 'Bridge' in this form.

An Income Efficient Portfolio™ grows your
income to last the length of your retirement

For more information go to www.bridgefm.co.za

BRIDGE
COLLECTIVE INVESTMENTS

Bridge Collective Investments (RF) (Pty) Ltd.
Reg No. 2008/022492/07

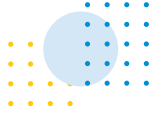


IMPORTANT INFORMATION

- Please complete this form to appoint, terminate or change the Financial Advisor linked to your unit trust investment.
- If your Financial Advisor is not a registered Financial Advisor, a registration form together with this instruction is required. However, while the registration is being processed, your request will be placed on hold until approved.
- If you wish to change any of your personal details, please complete and submit a 'Change of Details' form.
- If you have changed your Financial Advisor (if applicable) or if you have come of age since your initial investment, in terms of the Financial Intelligence Centre Act, 38 of 2001 (FICA), documentation may be required to process this instruction.
- Please email completed form and supporting documentation to investments@bridgefm.co.za.
- Complete the relevant sections of this form in BLOCK LETTERS.
- Ensure that all information is accurate.
- No instruction will be processed unless all the requirements have been met.
- The daily cut-off for receipt of instructions is 14h00.
- Please contact Bridge on 0800 117 842 or via email at investments@bridgefm.co.za should you require assistance completing this form.

DOCUMENT CHECKLIST

Completed Advisor Form. ●



1. INDIVIDUAL INVESTOR DETAILS

Investor Number

Title Prof Dr Mr Mrs Ms Miss Other _____

Surname/Registered Name _____

First Name(s) _____

Identity/Passport/Entity Registration Number

Full Name of person acting on behalf of investor _____

Relationship _____

CHANGE OF DETAILS

Have any of your existing details on record with Bridge changed? Yes No

If yes, please download a 'Change of Details' form, available on www.bridgefm.co.za to update your details.

2. FINANCIAL ADVISOR APPOINTMENT, CHANGE OR TERMINATION

This instruction will be applied across all unit trust portfolios under the aforementioned investor number.

PLEASE INDICATE ONE OPTION ONLY:

- I would like to **Appoint** a new Financial Advisor - please complete sections 2.1, and Declaration and Fees.
- I would like to **Change** my existing Financial Advisor - please complete sections 2.2, and Declaration and Fees.
- I would like to **Terminate** the services of my Financial Advisor - please complete section 2.3.

When appointing and changing your Financial Advisor, the new Financial Advisor must be licenced to give advice on Bridge investments held by the investor.

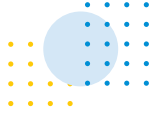
2.1 FINANCIAL ADVISOR APPOINTMENT

I hereby appoint the services of the following Financial Advisor in respect of all unit trust portfolio(s) held under the aforementioned investor number and agree to pay the fees indicated in Section 2.4.

Name of Financial Services Provider _____

Financial Advisor Name/Contact Person _____

Bridge FSP code _____



2.1 CONTINUED (FINANCIAL ADVISOR APPOINTMENT)

Cellular Number _____ Work Telephone _____
 Email Address _____ Fax _____

2.2 FINANCIAL ADVISOR CHANGE

I hereby terminate the services of my existing Financial Advisor and appoint the following Financial Advisor in respect of all Unit Trust Portfolio(s) held under the aforementioned investor number and agree to pay the fees indicated in Section 2.4.

Name of Financial Services Provider _____
 Financial Advisor Name/Contact Person _____
 Bridge FSP code _____
 Cellular Number _____ Work Telephone _____
 Email Address _____ Fax _____

2.3 FINANCIAL ADVISOR TERMINATION

I hereby terminate the services of the following Financial Advisor in respect of all Unit Trust Portfolio(s) held under the aforementioned investor number and instruct Bridge to stop paying all financial planning fees. I agree to pay the fees indicated in Section 2.4.

I acknowledged that Bridge is acting as the primary accountable institution and I will provide appropriate FICA documentation in order to transact on my account. If not provided, I will not be able to transact on my investment account.

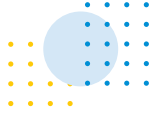
Name of Financial Service Provider _____
 Financial Advisor Name/Contact Person _____
 Bridge FSP code _____
 Cellular Number _____ Work Telephone _____
 Email Address _____ Fax _____

2.4 NEGOTIABLE FINANCIAL ADVISOR FEES

I agree to pay the following negotiated fees on this and all future transactions until otherwise specified.

Initial Advice Fee	<input type="text"/> <input type="text"/> <input type="text"/> %	Maximum 3.0% (excl. VAT) deducted prior to the investment being made (1.0% for Bridge Diversified Preference Share Fund).
Annual Advice Fee	<input type="text"/> <input type="text"/> <input type="text"/> %	Maximum 1.0% (excl. VAT) of the investment portfolio (0.5% for Bridge Diversified Preference Share Fund). If no annual fee is payable, please insert 0%. The annual advice fee is paid by a unit reduction and monthly in arrears.





3. DECLARATION BY FINANCIAL ADVISOR

I/We

- declare that I/we am/are a licensed Financial Services Provider(s) and have made disclosures required in terms of the Collective Investment Schemes Control Act, 2002, and the Financial Advisory and Intermediary Services Act of 2002, and subordinate legislation thereto, to the investor.
- warrant that I/we have explained all fees that relate to this investment to the investor and I/we understand and accept that the investor may withdraw his/her authority for payment to me/us in writing.

Signed at _____ on this _____ day of _____ year _____

Signature of Financial Advisor _____

4. INVESTOR DECLARATION

1. I confirm that all information provided in this form and all other documents signed by me in connection with this application, whether in my handwriting or not, are correct.
2. I am responsible for the accuracy and completeness of all answers, statements or other information provided by me or on my behalf.
3. I have not received advice from Bridge in respect of this application.
4. I indemnify and hold Bridge harmless against any and all claims, losses and / or damages which I may incur or suffer as a result of my independent decision to invest in this particular investment product.
5. I confirm that Bridge may accept instruction from my Financial Advisor or any authorised third party only if appointed and authorised by me in writing.
6. I confirm that Bridge may accept signed instructions by electronic means.
7. I confirm that my appointed Financial Advisor will have access to my investment details via the secure section of www.bridgefm.co.za.
8. I have read and understood the 'Portfolio Summary Overview & Fees' and the 'Minimum Disclosure' document available on www.bridgefm.co.za.
9. I have read, understood and agreed to the 'Terms & Conditions' attached.
10. I agree to notify Bridge immediately in the event that information provided herein changes.

Signed at _____ on this _____ day of _____ year _____

Signature of Investor/person
acting on behalf of Investor _____

