

**TRANSFER**  
**INDIVIDUALS / ENTITY**

Boutique Collective Investments (RF) (Pty) Ltd administers the BCI unit trusts. It is authorised to do so as a Manager, in terms of the Collective Investment Schemes Control Act. In this document it will be referred to as "BCI"

**IMPORTANT INFORMATION**

1. This form is to be used by existing investors only
2. Please read the Terms and Conditions that apply to this investment. This is available from your financial adviser, the Client Service Centre or at [www.bcis.co.za](http://www.bcis.co.za)
3. Please fax the completed form to our Client Service Centre - (011) 263 6152 | email: [instructions@bci-transact.co.za](mailto:instructions@bci-transact.co.za)

**SECTION 1: CURRENT INVESTOR DETAILS**

BCI Investor Number / Client Account Number

Title

Surname / Entity Name (e.g company or trust)

Name of Investor / authorised contact person

ID or passport number / Registration number

Telephone numbers Home  Work

Mobile

Email address

Signature of transferor  Date  /  /

**SECTION 2: INVESTMENT TRANSFER DETAILS**

Would you like **all** your units to be transferred:  Yes  No

If No, Please indicate how your unit trust portfolio/s should be transferred in the table below:

Unit Trust Portfolio	Account number	Total amounts			
<input type="text"/>	<input type="text"/>	R <input type="text"/>	or	<input type="text"/>	units or <input type="text"/> %
<input type="text"/>	<input type="text"/>	R <input type="text"/>	or	<input type="text"/>	units or <input type="text"/> %
<input type="text"/>	<input type="text"/>	R <input type="text"/>	or	<input type="text"/>	units or <input type="text"/> %
<input type="text"/>	<input type="text"/>	R <input type="text"/>	or	<input type="text"/>	units or <input type="text"/> %
<b>TOTAL</b>		R <input type="text"/>		<input type="text"/>	<b>units</b>

The transfer of participatory interests is automatically classified as a Capital Gains Tax event. If you are transferring ownership to your spouse, you may choose to have the event rolled over to the transferee. Please note that the spouse must be a resident in terms of South African Tax Law.

Roll over CGT event for this transfer:  Yes  No

**SECTION 3: INVESTOR DETAILS TRANSFERING TO**

If transferee is not an existing unit trust account holder, please complete an application form and forward to us with all your FICA documentation.

BCI Investor Number / Client Account Number

Title

Surname / Entity Name (e.g company or trust)

Name of Investor / authorised contact person

ID or passport number / Registration number

Telephone numbers Home  Work

Mobile

Email address

Residential / Physical / Registered address

Postal address (if different from above)

Postal Code

