



## DISCRETIONARY INVESTMENT ADVISOR ONLINE PERMISSION 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 ensure that you read the Terms and Conditions. This is available from your financial adviser, the Client Service Centre or at [www.bcis.co.za](http://www.bcis.co.za).
3. Please email required documents to the Client Service Centre at [lynn@bcis.co.za](mailto:lynn@bcis.co.za) or fax to (0)86 502 5319.

Permission is hereby given to the below investment advisor, to have online transactability access to my BCI unit trust investment account.

### SECTION 1: 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 (H)

(W)

Fax

Mobile

Email

### SECTION 2: APPOINTMENT OF A DISCRETIONARY INVESTMENT ADVISOR

#### INVESTMENT ADVISOR

Full name and surname

Financial Service Provider name (FSP)

FSP license number

Financial advisor code

Advisor assistant dealing with this transaction

#### Financial advisor declaration

- |  |     |    |
|--|-----|----|
| 1. I confirm that where the applicant is a minor, I have obtained the legal guardian's consent to process the personal details of the minor as contained herein. | Yes | No |
| 2. I confirm that I am a FSCA approved discretionary investment manager.   | Yes | No |

Signature of financial advisor

Date

 /  / 

Name of signatory

#### INVESTOR (to be completed by investor)

##### Discretionary mandate declaration

The above FSP is approved as a Category II Discretionary Investment Manager and the Client has mandated the FSP/Representative to act on his/her behalf in terms of a discretionary mandate, a copy of the discretionary mandate must be provided. BCI will not act on instructions from the FSP/Representative if not provided.

- |   |     |    |
|---|-----|----|
| 1. I confirm that I have entered into a mandate with the above approved discretionary FSP.  | Yes | No |
| 2. I agree and understand that, in terms of the mandate, the FSP may give BCI investment instructions directly, and I authorise BCI to accept all instructions, including electronic transactions, submitted by the FSP on my behalf. | Yes | No |
| 3. I confirm that where the applicant is a minor that I am the legal guardian of the minor, and have consented to the approved FSP processing the personal details of the minor in respect of this application.                       | Yes | No |

Signature of investor(s) or legal guardian/  
Person acting on behalf of investor

Date

 /  / 

Name of signatory

### SECTION 3: INVESTOR DECLARATION

- + I confirm that all information provided in this form and all other documents signed by me in connection with this form, whether in my handwriting or not, are true and correct.
- + Where this form is signed in a representative capacity I confirm that I have the necessary authority to do so.
  - This document gives BCI permission to make certain information available to the investment advisor specified in this form and BCI reserves the right to revoke this consent if either party breaches any of the terms and conditions or any of the rules.
  - By providing access and making this information available, you acknowledge and agree that BCI is not responsible for any loss, whether direct or indirect, resulting from the disclosure of information or the execution of trades by the investment advisor.
  - You agree that once you have given permission BCI may give all the information available online to the named investment advisor.
  - You agree that the investment advisor receiving this information and online transactable rights may not hold BCI responsible for any claims that result from the wrongful use or disclosure of the information by the investment advisor.
  - The permissions granted will only terminate upon your specific instructions in writing.
- + I have read, understood and agree to the latest **Terms and Conditions** on the BCI website [www.bcis.co.za](http://www.bcis.co.za).
- + Where signed in the capacity as legal guardian, I explicitly consent to the use of the minor's personal details contained herein.

### PRIVACY STATEMENT

Boutique Collective Investments (RF)(Pty) Ltd ("BCI") takes your privacy and the protection of your personal information seriously, and we will only use your personal information in accordance with Applicable Laws and the BCI Privacy Policy. It is important to us that you understand how we obtain, process, store, and share your information. By submitting any personal information to BCI you provide consent to the processing and sharing where applicable of your personal information and/or that of your children or children that you have legal guardianship over (if applicable) as set out in the Privacy Policy. Please do not submit any personal information to BCI if you do not agree to any of the provisions of the Privacy Policy. If you do not consent to the provisions of the Privacy Policy, or parts thereof, BCI may not be able to provide its products and/or services to you. To access the BCI Privacy Policy please click on the [link](#) or on the BCI website [www.bcis.co.za](http://www.bcis.co.za).

Signature of investor(s) or legal guardian/  
Person acting on behalf of investor

Date   /   /

Name of signatory

### CONTACT DETAILS

#### + Physical Address

Boutique Collective Investments  
Catnia Building  
Bella Rosa Village  
Bella Rosa Street  
Bellville  
7530

#### + Contact us

Tel: +27 21 007 1500/1/2 | Fax: +27 (0)86 502 5319  
Email: [clientservices@bcis.co.za](mailto:clientservices@bcis.co.za) | [compliance@bcis.co.za](mailto:compliance@bcis.co.za)  
Visit our website: [www.bcis.co.za](http://www.bcis.co.za)

*Should you have any complaints, please send an email to [complaints@bcis.co.za](mailto:complaints@bcis.co.za)*

#### + Custodian / Trustee

The Standard Bank of South Africa Limited  
Tel: +27 21 441 4100

**ASISA**

AN ORDINARY MEMBER OF THE ASSOCIATION FOR SAVINGS & INVESTMENT SA