

Useful information about Family Network and connecting family members



Contact details

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Cut off and time lines

- All complete and valid instructions received **before 14:00** on a business day will be processed on the **same day**.
- Complete and valid instructions received **after 14:00** will be processed on the **next business day**.
- Any errors are to be reported within **fourteen days** of your instruction confirmation being received.

Consider getting financial advice

PPS Investments does not provide financial advice. However, we believe in the merits of good financial advice. If you are not comfortable making your own investment decisions, consider using the services of an accredited financial adviser.

Useful information about the Family Network

With Family Network, each family member's investments are connected to determine the total Family market value to which the PPS Investments administration fee scale will be applied. This establishes the administration fee that will apply to each family member. The more you and your family invest with us, the more everyone benefits.

An investor (the "Core Investor") may create a Family Network by connecting their family members who hold PPS and/or OPN investment products on the PPS Investments investment platform. The Core Investor may connect the following family members, as defined within this application:

- The Spouse(s) of the Core Investor;
- The Child(ren) of the Core Investor and/or Spouse;
- The Parent(s) of the Core Investor; and/or
- The Parent(s)-in-Law of the Core Investor.

Important: In order to join a Family Network, you must be invested solely in the PPS Investments Select Fund Range. If you are not invested in the Select Fund Range, upon receipt of your Family Network connection application, PPS Investments will automatically switch your investment options from the Original Fund Range to the Select Fund Range. Switches will be processed and finalised within a maximum of **five business days**. Certain switches cannot be processed during the period where fees, annuity income or regular withdrawal payments are being processed. This is to ensure those payments can be made. Please contact us to confirm timings.

Additional tools and resources

Explore the Family Network playzone by visiting www.pps.co.za/familynetwork to establish the best structure for your family. You can create and manage your Family Network by visiting www.pps.co.za/login. Visit www.pps.co.za/familynetwork for the latest Family Network Terms and Conditions.

GLOSSARY

Child	A biological child or legally adopted child of the Core Investor and/or their Spouse.
Core Investor	A PPS or OPN investor who wishes to create a Family Network with his/her Spouse(s), Parent(s), Parent(s)-in-Law and/or Child(ren), as defined below; to benefit from the combination of their assets under management when calculating their platform administration fee percentage.
Family market value	The sum of all assets owned by investors, on the PPS Investments platform, connected to a relevant Family Network.
Family Network	The group of investors who connected to benefit from the combination of their assets under management on the PPS Investments platform when calculating their administration fee percentage.
Parent	A biological or adoptive parent of the Core Investor.
Parent-in-Law	A biological or adoptive parent of the Spouse ¹ .
Spouse	<p>A person with whom the Core Investor is married at the date of application for Family Network connection.</p> <p>A "Marriage" for the purpose of Family Network shall be restricted to the following relationships:</p> <ul style="list-style-type: none">• A Civil Marriage concluded and duly registered in terms of the Marriage Act of 1961;• A Customary Marriage concluded and duly registered in terms of the Customary Marriages Act of 1998; or• A Civil Union, in the form of either a marriage or civil partnership, concluded and duly registered in terms of the Civil Union Act of 2006; <p>and for which a valid marriage certificate or court order can be produced.</p> <p>A "Life Partner" shall mean a person with whom the Core Investor has entered into a written domestic or cohabitation agreement and where such domestic or cohabitation agreement can be produced. The same rules will apply to a Life Partner as to a spouse for the purposes of Family Network, unless stated otherwise.</p>

Please note:

- The above definition of "Spouse", "Life Partner", "Parent", "Parent-in-Law" and "Child" will only apply in terms of the Family Network benefit as discussed herein.
- No information will be shared with respect to any transactional investment information or investment statements with the Core Investor.

¹A maximum of two Parents-in-Law may be connected to a Core Investor.

FAMILY NETWORK CONNECTION FORM



PROFESSIONAL PROVIDENT SOCIETY INVESTMENTS PROPRIETARY LIMITED ("PPS INVESTMENTS")
CLIENT SERVICE CENTRE CONTACT DETAILS
TEL: 0860 468 777 (0860 INV PPS)
EMAIL: admin@ppsinvestments.co.za

FAX: 021 680 3680
WEBSITE: www.pps.co.za/invest

A CONTACT PERSON FOR OUTSTANDING REQUIREMENTS

Name and surname

Telephone number

Email

Capacity

B PERSONAL DETAILS OF CORE INVESTOR

Title

PPS Investments client number

Surname

Identity/passport number

First name(s)

Email address (compulsory)

Declaration by Core Investor

I agree and declare that:

- I have read, understood and agree to the Family Network Terms and Conditions available on the PPS Investments website.
- I am applying for my PPS Investment client number to be connected to the PPS Investments client number(s) of my Spouse(s), Parent(s), Parent(s)-in-Law and/or Child(ren) as indicated on this application, in order to form a Family Network.
- I am aware that creation of a Family Network will not automatically reduce the administration fees I am charged.
- I understand that, in order to join a Family Network, I must be invested solely in the PPS Investments Select Fund Range and may only select investment options from the Select Fund Range. The assets to be connected must also be in the Select Fund Range. I acknowledge and consent that where assets are held in the Original Fund Range, they will automatically be switched to the Select Fund Range in order to be connected.
- I hereby authorise PPS Investments to switch my investment options from the Original Fund Range to the Select Fund Range, where applicable.
- The account holder of the PPS Investments client number that I am applying to be connected to is aware of this connection request and has completed Part C and/or D of this application form (where applicable). I understand that I do not have any rights or obligations to the investment accounts of the PPS Investments client number(s) that I am being connected to.
- I acknowledge that it is my sole responsibility to inform PPS Investments of any changes to my relationship status with any family member connected to my Family Network.
- All information provided in this form and all other documents signed by me, whether in my handwriting or not, is correct.
- I am responsible for the accuracy and completeness of all answers, statements or other information provided by me or on my behalf.
- I have not received advice from PPS Investments or the Administrator.

Signed at

on this

day of

20

Signature of Core Investor

C FAMILY MEMBER INFORMATION (EXCLUDING MINOR CHILDREN)

I hereby acknowledge that I am aware that the Core Investor, whose details are in Part B, is submitting this application and that I am the:

Spouse or Life Partner of the Core Investor;

Parent of the Core Investor;

Parent-in-Law of the Core Investor; or

Child of the Core Investor and/or their Spouse,

as defined herein.

Title

PPS Investments client number

Surname

Identity/passport number

First name(s)

Declaration by family member

I agree and declare that:

- I have read, understood and agreed to the Family Network Terms and Conditions available on the PPS Investments website.
- I hereby consent to the sharing of my personal information, as defined in any applicable legislation, with the Core Investor.
- I am aware that connecting to the Core Investor's Family Network will not automatically reduce the administration fees I am charged.
- I understand that, in order to be connected to a Family Network, I must be invested solely in the PPS Investments Select Fund Range and may only select investment options from the Select Fund Range. I acknowledge and consent that where assets are held in the Original Fund Range, these assets will automatically be switched to the Select Fund Range in order to be connected.
- I hereby authorise PPS Investments to switch my investment options from the Original Fund Range to the Select Fund Range, where applicable.
- I understand that I do not have any rights or obligations to the investment accounts of the PPS Investments client number(s) that I am being connected to.
- I acknowledge that it is my sole responsibility to inform PPS Investments of any changes to my relationship status with any family member connected to this Family Network.
- All information provided in this form and all other documents signed by me, whether in my handwriting or not, is correct.
- I am responsible for the accuracy and completeness of all answers, statements or other information provided by me or on my behalf.
- I have not received advice from PPS Investments or the Administrator.

Signed at _____ on this _____ day of _____ 20____

Signature of family member

D INFORMATION OF MINOR CHILD(REN)

	First name(s) of child	Surname of child	PPS Investments client number
1			
2			
3			
4			

Declaration by the parent/guardian of minor child(ren):

I agree and declare that:

- I have read, understood and agree to the Family Network Terms and Conditions available on the PPS Investments website.
- I, on behalf of the Child(ren), hereby acknowledge that I am aware that the Core Investor, whose details are in Part B, is submitting this application and that I am the parent/guardian of the Child(ren), as defined herein.
- I confirm that the Child(ren) is/are the Child(ren) of the Core investor and/or Spouse, as defined herein.
- I hereby consent to the sharing of the Child(ren)'s personal information, as defined in any applicable legislation, with the Core Investor.
- I am aware that connecting to the Core Investor's Family Network will not automatically reduce the administration fees that my Child(ren) is/are charged.
- I understand that, in order to be connected to a Family Network, the Child(ren) must be invested solely in the PPS Investments Select Fund Range and may only select investment options from the Select Fund Range. I acknowledge and consent that where assets are held in the Original Fund Range, these assets will automatically be switched to the Select Fund Range in order to be connected.
- I hereby authorise PPS Investments to switch the Child(ren)'s investment options from the Original Fund Range to the Select Fund Range, where applicable.
- I understand that the child(ren) does/do not have any rights or obligations to the investment accounts of the PPS Investments client number(s) that they are being connected to.
- I acknowledge that it is my sole responsibility to inform PPS Investments of any changes to the child(ren)'s relationship status with any family member connected to this Family Network.
- All information provided in this form and all other documents signed by me, whether in my handwriting or not, is correct.
- I am responsible for the accuracy and completeness of all answers, statements or other information provided by me or on my behalf.
- I have not received advice from PPS Investments or the Administrator.

Signed at _____ on this _____ day of _____ 20____

Signature of parent/guardian



PPS Investments (Pty) Ltd, PPS Multi-Managers (Pty) Ltd, PPS Investment Administrators (Pty) Ltd and PPS Insurance Company Ltd are licensed financial services providers. Coronation Life Assurance Company Limited is registered in terms of the Long Term Insurance Act 53 of 1998 to carry on long term insurance business. PPS Management Company (Pty) Ltd (RF) is a licensed collective investment scheme manager. PPS Nominees (Pty) Ltd is an independent nominee company approved by the Financial Sector Conduct Authority.

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