EFPC INVESTMENT QUESTIONNAIRE

ADVISOR DETAILS

Advisor:

Fees:

Language of report:

PERSONAL DETAILS

Title:

First Names:

Surname:

SA ID Number:

Country of Citizenship:

SA Income Tax Number:

CURRENT INVESTMENT DETAILS

Total Investment Amount:

Current investment administrator:

Type of Investment:

Source of Funds (Savings, etc):

Transfer Existing Investment?

REQUIRED INVESTMENT

Income Required: Yes | No

- Monthly income required (pre-tax):

Investment Horizon (years):

FUND ALLOCATION

EFPC (Select % split)

Local House View:

Global House View:

Local Note:

Global Note:

Dynamic Portfolio:

Income portion

Naviga Fund:

Investec CCM:

Offshore Investment Structure

Direct Investment: Yes | No

Investment Through LISP/Wrapper: Yes | No

Additional Information / Special Instructions:

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