



TOP UP BOND SWITCH APPLICATION FORM

PLEASE NOTE

- All mandatory fields must be completed.
- Ensure that all information provided is accurate and all required documents as stated on the checklist are attached when sending this form.
- No instruction will be processed unless all the above requirements have been met.
- Top Up Bond Switch Application forms received after the 20th each month will be processed the following month.
- Completed forms must be faxed to 012 315 5675 or emailed to queries@rsaretailbonds.gov.za
- Should you have any queries regarding this form, please contact us on 012 315 5888.

PLEASE WRITE THE DETAILS IN BLACK AND IN CAPITAL LETTERS WHERE APPLICABLE.

SECTION 1 - PERSONAL DETAILS

Full Names and Surname: _____ ID Number

Investor Number:

SECTION 2 - SWITCH OPTION DETAILS

Top-Up Reference Number

Please tick the appropriate option.

Switch capital and accrued interest Switch a portion on the invested amount only

Amount in Figures: R

Amount in words: _____ Rands

SECTION 3 - NEW INVESTMENT DETAILS

Please tick the appropriate option.

1 Fixed Rate Retail Savings Bond
 2 Inflation Linked Retail Savings Bond
 3 Interest Usage on New Investment
 Two Year Three Year Five Year
 Three Year Five Year Ten Year
 Re-invest Pay Semi-Annually Pay Monthly

SECTION 4

The Switch option can only be processed after the first interest capitalisation or withdrawal. The balance that can be switched will be the balance as at the last interest calculation date or balance as at withdrawal date even if there may be subsequent deposits.

Switches are processed daily, from the 1st to the 20th of each month. Any Switch application forms received after the 20th of the month are processed in the following month.

The Terms and Conditions of the product you Switch to will apply. The interest rate of your new Fixed or Inflation-linked RSA Retail Savings Bond investment shall be the prevailing interest rate on the day of the activation date of the investment being Switched to.

When you Switch the Capital and Accrued interest of your Top-Up RSA Retail Savings Bond, the Top-Up reference number will be de-activated, you will have to apply for a new Top-Up RSA Retail Savings Bond to receive a new reference number to use when making a deposit

When you switch a portion of your Top-Up RSA Retail Savings Bond, a minimum of R250 must remain to keep the Top-Up RSA Retail Savings Bond active, then the Top-Up reference number will remain active and you may continue to use it to make deposits until maturity.

All investments that are Switched to the Fixed Rate RSA Retail Savings Bond where the interest usage is monthly, shall have their interest paid in arrears, that is, investments Switched this month, shall have their interest paid at the end of the following month.



national treasury

Department:
National Treasury
REPUBLIC OF SOUTH AFRICA



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SECTION 5 – INVESTOR’S SIGNATURE* (MANDATORY)

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.

I consent to RSA Retail Savings Bonds processing my personal information according to the Terms and Conditions.

I confirm that RSA Retail Savings Bonds may accept instructions in the prescribed format by fax or via other electronic means.

Full Names

Signature

Date

SECTION 6 - GUARDIAN OR PARENT/ POWER OF ATTORNEY

If you are acting on behalf of another person (either a minor child or an incapacitated person) please complete the below fields in full, and if you are not a legal guardian of a minor child and not a parent, please attach the original Power of Attorney certified by a Commissioner of Oaths with all FICA documents.

Full Names

Signature

Date

ID Number: