

DISCRETIONARY MANDATE

Please print and complete the form, then post to CLIENT SERVICES at PO Box 7520, Centurion 0046 together with an originally certified copy of both the client and the investment manager's ID documents (signed three times by each ID owner). The client and the investment manager will need to separately register on the Equinox website and provide Equinox with documentation sufficient to verify their credentials and authority.

A. TO BE COMPLETED BY INDIVIDUAL CLIENTS INVESTING THROUGH INVESTMENT MANAGERS

1. I, the undersigned, acknowledge that I will be dealing with Equinox through

_____ ,
(insert full name of investment manager) as my investment manager.

My investment manager is appointed on a discretionary / non-discretionary basis (delete option that is not applicable)* for the following unit trust investment portfolios, which are owned by me, or for which I am duly authorised to make such decisions on behalf of:

Portfolio Name	Portfolio Reference Number (for office use)

If my investment manager is appointed on a discretionary basis, by my signature of this document, I authorise Equinox to accept instructions on my behalf from my investment manager.

**note: An investment manager appointed on a non-discretionary basis will only be given viewing rights on his client's portfolio. An investment manager appointed on a discretionary basis may exercise discretion and buy or sell investments on behalf of the client without the client's prior approval.*

- I warrant that my personal details and particulars that I have supplied in the Equinox online application forms are true and correct, and that I shall duly notify Equinox in writing online of any changes.
- I wish to conclude an agreement with Equinox in terms of the Equinox standard terms and conditions as contained on the Equinox website, which terms and conditions I acknowledge to have read, understand and agree to be bound by. I appoint Equinox to invest in units in collective investment schemes on my behalf as instructed from time to time. I also appoint Equinox Nominees (Pty) Ltd as my nominee to hold all the investments that I instruct Equinox to buy on my behalf.
- I agree to abide by any rules, procedures, standards, requirements or other conditions that may be established by Equinox in connection with the use of its electronic services or any other electronic communications services made available by Equinox.
- All amounts to be invested will be transferred into the bank account of Equinox Nominees, as set out in Particulars Schedule of the Terms and Conditions contained on the Equinox website, and subject to amendment. I will specify my Equinox user name on all deposit slips and similar documents.
- I agree to pay Equinox the fees set out in the Fees Schedule of the Terms and Conditions contained on the Equinox website, in return for the services rendered by it. I understand the fees may be amended subject to 3 months written notice.
- I hereby authorise Equinox to deduct any fees and amounts due to Equinox.
- I warrant that the information contained in this form and all information provided to Equinox is true and correct and that all money invested through the Equinox website is obtained from legitimate sources and comply with relevant legislation.

Signed at _____ on this _____ day of _____ 20 _____

Full name _____ ID number _____

Signature _____

B. TO BE COMPLETED BY THE INVESTMENT MANAGER

1. I warrant that ~ (please indicate which option applies)

1.1. I am acting on behalf of a friend or family member namely

1.2. I am duly authorised to manage the investments on behalf of the person named in 1.1.

1.3. I do not manage investments as a regular feature of my business and I do not receive any remuneration in whatever form for the management of the investments.

1.4. my personal details and particulars that I have supplied in the Equinox online application forms are true and correct, and that I shall duly notify Equinox in writing online of any changes.

2. I acknowledge to have read, understand and agree to be bound by the Equinox standard terms and conditions as contained on the Equinox website.

Signed at _____ on this _____ day of _____ 20 _____

Full name _____ ID number _____

Signature _____

Applicant's initials