

Boutique Collective Investments (RF) (Pty) ("BCI") Ltd is part of the Apex Group Ltd. BCI is a registered Manager of the Boutique Collective Investments Scheme, approved in terms of the Collective Investments Schemes Control Act, No 45 of 2002.

Please fax the completed form to our Client Service Centre - (0)86 502 5319, or email [instructions@bci-transact.co.za](mailto:instructions@bci-transact.co.za).

✚ Login details will be sent to you via sms.

## FOR BROKER HOUSE

☐

New user

☐

Existing user (update details)

### FOR BROKER HOUSE ACCESS

Existing Broker House Number

Broker House Name

Registration Number

### FOR WEB-USER: Participant wishing to have global-access-view to all financial advisors linked to the Broker House)

Title

Surname

First Name(s)

ID Number / Passport Number (if foreign national)

Telephone (H)/(W)

Mobile

Email

### FOR FINANCIAL ADVISOR ACCESS

Broker code

Title

Surname

First Name(s)

ID Number / Passport Number (if foreign national)

Telephone (H)/(W)

Mobile

Email

## SECURE ON-LINE ACCESS

Do you require read only access to your investment?

☐

Yes

☐

No

On acceptance of your form, you will be granted access to on-line services subjected to the terms on this form.

## BROKER DECLARATION

- + I confirm that all information provided in this form is true and correct.
- + Where this application form is signed in a representative capacity, I confirm that I have the necessary authority to do so.
- + I confirm that BCI may accept instructions from any authorised third-party who has been authorised by me in writing.
- + I have read and understood the relevant fund factsheets (minimum disclosure documents) of the unit trusts I wish to invest in.
- + 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.
- + BCI will accept electronic signatures.
- + I hereby indemnify and hold BCI, its affiliates, directors, officers, employees, and agents harmless from and against any and all claims, losses, liabilities, damages, costs, and expenses (including reasonable legal fees) arising from or in connection with the use of electronic signatures, including any fraud, misrepresentation, or unauthorised use by any person.

### 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. We may disclose your information to other entities in the Apex Group and/or its subsidiaries, agents, partners, or sub-contractors, for purposes as described in this application or related privacy policies. By submitting any personal information to BCI you provide us with your consent to, alternatively acknowledge, the processing and sharing of your personal information and/or that personal information which you have provided that relates to other data subjects, as set out in the Privacy Policy. Please do not submit any personal information to BCI if you do not agree/ object to any of the provisions of the Privacy Policy. Should you object to 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).

Full name of financial advisor

Capacity

Full name of assistant to financial advisor

Capacity

Signature of financial advisor

Date

D	D	M	M	Y	Y	Y	Y
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Signature of assistant to financial advisor (where applicable)

Date

D	D	M	M	Y	Y	Y	Y
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## CONTACT DETAILS



### Physical Address

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



### Custodian / Trustee

The Standard Bank of South Africa Limited  
Tel: +27 (0)21 441 4100

### Contact us

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Email: [bcis\\_clientservices@fundrock.com](mailto:bcis_clientservices@fundrock.com) | [bci\\_compliance@fundrock.com](mailto:bci_compliance@fundrock.com)

Visit our website: [www.bcis.co.za](http://www.bcis.co.za)

Should you have any complaints, please send an email to [bci\\_complaints@fundrock.com](mailto:bci_complaints@fundrock.com)



AN ORDINARY MEMBER OF THE ASSOCIATION FOR SAVINGS & INVESTMENT SA