

# POINTS TO NOTE WHEN DOING STANLIB BUSINESS

STANLIB **cannot** adjust initial and ongoing adviser's fees retrospectively.

Providing proof that these charges were indeed quoted does not give STANLIB the authority to add these if it is not on the application form.

Advisers need to ensure that the **financial service provider charges** section on the STANLIB application form is fully completed before sending the application for processing.

FINANCIAL SERVICE PROVIDER CHARGES			
Where the client has not specified an initial FSP charge for lump sum or recurring investments, and / or an ongoing service charge, a fee of zero percent will apply. STANLIB cannot adjust these fees retrospectively.			
	Initial Lump Sum Investment (excl.VAT)	Ongoing Service Charge (excl.VAT)	Initial Recurring Investments (excl.VAT)
FSP Charge	%	%	%
SIGNATURE OF CLIENT/ AUTHORISED SIGNATORY*		DATE	<input type="text" value="DD - MM - 2020"/> <small>D D - M M - Y Y Y Y</small>
		SIGNED AT	<input type="text"/>
SIGNATURE OF FINANCIAL ADVISER*		DATE	<input type="text" value="DD - MM - 2020"/> <small>D D - M M - Y Y Y Y</small>
		SIGNED AT	<input type="text"/>

\* Compulsory fields

## Directive 135/Section 37 Transfers from Flexible Annuity to Liberty Living Annuity and Classic Linked Life Annuity.

- Annuitants **cannot** receive more than one annuity payment in **one month**;
- ALL Annuity payments on Liberty Living Annuities and Classic Linked Life Annuities are paid a two business days after the 20th of each month;
- Therefore, if an annuitant received an annuity payment on his Flexible annuity on 5 Feb 2021, and since this date the Flexible Annuity was transferred to a new Liberty Living Annuity, the next annuity payment will only be received two business days **after 20 March 2021**.

# STANLIB ENTRY POINTS

Numbers starting with:	55, 6 or 7	RA, LLA, PP, PE, MV, and IP
Where to send instructions to be processed 	<b>UNIT TRUST</b> E-mail: <a href="mailto:instructions@stanlib.com">instructions@stanlib.com</a>	<b>LINKED INVESTMENT SHARED PLATFORM</b> E-mail: <a href="mailto:lispinstructions@stanlib.com">lispinstructions@stanlib.com</a> Fax: 0867 277 516
Where to send change of adviser 	E-mail: <a href="mailto:instructions@stanlib.com">instructions@stanlib.com</a>	E-mail: <a href="mailto:lispinstructions@stanlib.com">lispinstructions@stanlib.com</a> Fax: 0867 277 516
Where to Send Letter of authority 	E-mail: <a href="mailto:utbrokersupport@stanlib.com">utbrokersupport@stanlib.com</a>	E-mail: <a href="mailto:lispbrokersupport@stanlib.com">lispbrokersupport@stanlib.com</a>
Where to send follow-up on instructions/general queries 	E-mail: <a href="mailto:utbrokersupport@stanlib.com">utbrokersupport@stanlib.com</a> Queries relating to the below must be sent to the above contact details: <ul style="list-style-type: none"> <li>• Commission/ commission statements</li> <li>• Legal and Compliance</li> <li>• Risk</li> </ul>	E-mail: <a href="mailto:lispbrokersupport@stanlib.com">lispbrokersupport@stanlib.com</a> Queries relating to the below must be sent to the above contact details: <ul style="list-style-type: none"> <li>• Commission/ commission statements</li> <li>• Legal and Compliance</li> </ul>
Where to send 1st escalation 48 hour Turn-around time 	E-mail: <a href="mailto:utbrokersupport@stanlib.com">utbrokersupport@stanlib.com</a> Tel: 0860 104 418	E-mail: <a href="mailto:lispbrokersupport@stanlib.com">lispbrokersupport@stanlib.com</a> Tel: 0860 104 418
Where to send 2nd escalation 24 hour Turn-around time 	<b>Team Leader:</b> Sjanee Pillay E-mail: <a href="mailto:Sjanee.Pillay@stanlib.com">Sjanee.Pillay@stanlib.com</a> Tel: 0860 104 418	<b>Team Leader:</b> Glenda Rama E-mail: <a href="mailto:Glenda.Rama@stanlib.com">Glenda.Rama@stanlib.com</a> Tel: 0860 104 418
Where to send 3rd escalation 24 hour turn-around time 	<b>Head of Cleint Services:</b> Thabiso Masiela E-mail: <a href="mailto:Thabiso.Masiela@stanlib.com">Thabiso.Masiela@stanlib.com</a> Tel: 011 448 5672	<b>Head of Intermediary Servicing:</b> Chris Cronje E-mail: <a href="mailto:Chris.Cronje@stanlib.com">Chris.Cronje@stanlib.com</a> Tel: 011 448 6515