



# Tax-free Account Transfer

## Transferring Tax-free funds into Standard Bank



1.



Customer visits Standard Bank and informs the branch consultant that he would like to transfer funds from his Tax-free account at ABC Bank to Standard Bank.

2.



Branch consultant prints the **Request for Transfer** form and **Tax-free Transfer Rules** document. She completes the required details on the **Request for Transfer** form.

3.



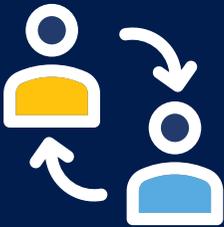
Branch consultant explains the two documents and asks the customer to sign.

4.



Customer signs and hands the **Rules** document back to the consultant.

5.



Customer hands in the **Request for Transfer** form at ABC Bank.

6.



ABC Bank transfers the funds to Standard Bank and sends a **Tax-free Transfer Certificate** to the customer and Standard Bank.

7.



Standard Bank receives the **Tax-free Transfer Certificate** and clears the funds into the customer's Tax-Free Call Plus account.



# Tax-free Account Transfer

Transferring Tax-free funds to another institution



1.



Customer visits ABC Bank and informs them that she wants to transfer funds from her Standard Bank Tax-free account to ABC Bank. ABC Bank provides customer with a **Request for Transfer** form, which the customer completes.

2.



Customer hands in a completed **Request for Transfer** form at the SBSA branch.

3.



Branch consultant prints the **Tax-free Transfer Rules** document. Reads it to the customer and asks the customer to sign it.

4.



Customer signs and hands the **Rules** document back to the consultant.

5.



The branch consultant validates that the customer's email address is correct. She captures a **Tax-free Transfer Service** request on Customer1st.

6.



She uploads the **Request for Transfer** form from ABC Bank and the **Rules** document.

7.



The **Service Request** is routed to processing centre. The processing centre team processes the transfer request to ABC Bank.