

PARAGRAPH 2(2B) OF THE FOURTH SCHEDULE TO THE INCOME TAX ACT

How to indicate a clients' desired tax rate type online

1. Log on to the Intermediary Web, click on the *Living Annuities* tile, select the relevant client by clicking the arrow on the right, and expand the *Client Information* menu item on the left:

≡						Glacier	r Living Annuity		•
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Client information	Portfolio sum	nary as at 20	23-11-13						
Summary									
Client due diligence	Glacler Download PDF ENGLACE								
Tax certificates	Personal Portfolio Living Annuity								
Paragraph 2(2B)	Inception date: 2023-11-13								
Client details									
Bank details	Fund fact sheet	Fund overview	Investment funds ↑	%	Price date	Price (c)	Units	Market value (R/c)	
Case tracking	Not available	*	ABSA Absolute - A (1.98%)	100.00	2023-11-13	174.78	429 110.88	749 999.99	
Correspondence	Total			100.00	0 749 999.99				
Investment information									
Modify investment	Personal Port	folio Living Annuity							
Reports 🗸	Inception date: 2023-	11-13						*	
	Fund fact sheet	Fund overview	Investment funds ↑	%	Price date	Price (c)	Units	Market value (R/c)	
	Not available	*	Allan Gray SA Equity - C (0.30%)	100.00	2023-11-13	43 276.66	1 155.36	500 001.21	
	Total			100.00 500 001.21					
	Total							1 250 001.20	

2. Select the Paragraph 2(2B) menu item:

My practice My reports	Forms & brochures Investment hub	Glacier International To	ols Useful links	Legal	Online support	Afrikaans	0	
						Glacier Living Annuity	.	
					Track a strategy		0	
					Type in overn nan	ne, ID, investment no., etc.	`.	
Paragraph 2(20)								
Current tax rate	3							
Tax rate type	Paragraph 2(28)							
Tax rate	22.00%							
01-1-1-	Output la							
Status	Opted in							
Effective date	17 April 2023							
Tax year ending	29 February 2024							
You may choose to opt out and instruct Glacier to apply the predicted PAYE tax rate of 0.00% (Opt out								
Paragraph 2/28) tax history								
r aragraphi z (zz) raz morory								
Tax year ending February	2024 View history							
Information								
If you choose the PAVE tay rates	and not the tax rate provided by 9889, you might be face	which a fav debt at the end of the fav i						
If you have opted out of the tax ra	te provided by SARS you will remain opted out until you cl	choose to opt in again.	6 m.					
	My practice My reports Paragraph 2(2B) Current tax rate Tax rate type Tax rate Status Effective date Tax year ending You may choose to opt out an Paragraph 2(2B) ta Tax year ending February Information If you become the MYC Eas rates If you become the MYC Eas rates	My practice My reports Forms & brochures Investment hub Paragraph 2(2B) Current tax rate Paragraph 2(2B) Tax rate Type Paragraph 2(2B) Tax rate Qoted in Effective date 17 April 2023 Tax year ending 29 February 2024 You may choose to opt out and instruct Glacier to apply the predicted PAVE tax Paragraph 2(2B) tax history Tax year ending February 2024 You may choose to opt out and instruct Glacier to apply the predicted PAVE tax Information Inform	My practice My reports Forms & brochures Investment hub Glacer International Tor Paragraph 2(2B) Current tax rate Image: Comparison of the compari	My reaction My reports Forms & brochures Investment hub Glacier International Tools Useful links Paragraph 2(2B) Current tax rate • •	My practice My reports Forms & brochures Investment hub Glacier International Tools Useful links Legal	My practice My reports Forms & brochures Investment hub Gladeier International Tools Useful links Legal Online support Paragraph 2(2B) Current tax rate • 2005 Status Oped in • <th>My practice My reports Forms & brochures Investment hub Glacier International Tools Useful Inits Legal Online support Atrikaans Glacier Manage Diperiod International Tools Useful Inits Legal Current Lax rate Paragraph 2(2B) Tax rate 2005 Status Optical Optical If Percent Data 17 Apris 2023 Tax year ending 20 P Housany 2024 You may choose to optical and matture! Diperiod International Optical Information Information Information Information Information Information Information Information Information The sease that PRIS Is rates and net the tax rate provider by SMRS, you might be faced with a tax outset at the and of the tax year: The sease the PRIS Is rates and net the tax rate provider by SMRS, you might be faced with a tax outset at the and of the tax year: The sease the PRIS Is rates and net the tax rate provider by SMRS, you might be faced with a tax outset at the and of the tax year: The sease the PRIS Is rates and net the tax rate provider by SMRS, you might be faced with a tax outset at the and of the tax year: The sease of the tax rates provider by SMRS, you might be faced with a tax outset at the and of the tax year: The sease of the tax rates provider by SMRS, you might be faced with a tax outset at the and of the tax year: The sease of the tax rates provider by SMRS, you might be faced with a tax outset at the and of the tax year:</th>	My practice My reports Forms & brochures Investment hub Glacier International Tools Useful Inits Legal Online support Atrikaans Glacier Manage Diperiod International Tools Useful Inits Legal Current Lax rate Paragraph 2(2B) Tax rate 2005 Status Optical Optical If Percent Data 17 Apris 2023 Tax year ending 20 P Housany 2024 You may choose to optical and matture! Diperiod International Optical Information Information Information Information Information Information Information Information Information The sease that PRIS Is rates and net the tax rate provider by SMRS, you might be faced with a tax outset at the and of the tax year: The sease the PRIS Is rates and net the tax rate provider by SMRS, you might be faced with a tax outset at the and of the tax year: The sease the PRIS Is rates and net the tax rate provider by SMRS, you might be faced with a tax outset at the and of the tax year: The sease the PRIS Is rates and net the tax rate provider by SMRS, you might be faced with a tax outset at the and of the tax year: The sease of the tax rates provider by SMRS, you might be faced with a tax outset at the and of the tax year: The sease of the tax rates provider by SMRS, you might be faced with a tax outset at the and of the tax year: The sease of the tax rates provider by SMRS, you might be faced with a tax outset at the and of the tax year:	



3. On the *Confirmation* screen, select the desired tax rate type. Then select the relevant radio button on the confirmation screen and click *Accept*.

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=	r					Glacier Living Annuity			
		Confirmation				36 tment no., etc.			
Client information	Paragra								
	Curre	You have requested the following changes:							
	Tax rate								
Tax certificates	Tax Tate	Current tax rate			New tax rate				
Client details	Tax rate	Tax rate type	Tax rate	Tax rate type	Tax rate				
	Status	Paragraph 2(2B)	22.00%	PAYE	0.00%				
	Effective	This tax rate is applied to the	annuity income from the following pla	an/s)		_			
	Tax uses	By choosing the PAYE tax ra	ates and not the tax rate provided by S	ARS your client might be faced wi	ith an unexpected tax debt at the end o	of the tax year			
Investment information	Tax year	Communication will be sent	to your client to confirm this change.	Arto, your clicit might be faced wi	in an unexpected tax debt at the chare	r ore any year.			
Modify investment Y	You may	Disclaimer							
Reports +	-	O I am appropriately licensed and authorised to give this instruction.							
	Dama	O I did not provide advice for this instruction and am only conveying the instruction on behalf of the client. I confirm that I have a copy of the instruction from the							
	Parag	Crent,							
	Tax year	To proceed with these changes, please select the appropriate disclaimer and click Accept.							
					Accep	Cancel			
	Informati	on							
	If you choose If you have op	o choose the PAYE tax rates and not the tax rate provided by SARS, you might be faced with a tax debt at the end of the tax year. In have opted out of the tax rate provided by SARS you will remain opted out until you choose to opt in again.							

Please contact your Glacier representative, should you have any questions.