



Overberg Asset Management FSP 783

Client Complaints Registration Form

Please email your completed form to: clientcomplaints@overberg.biz

Client details

Surname:		Title:	
First name(s):			
Occupation:			
Identity Number:			
Address/ Email to which we may communicate with you:			
Telephone daytime:		Cell:	

Details of the person/s against whom you are complaining

Name of person:	
Position/ role: e.g., Advisor/ Admin	

Complaint details

Financial product(s):				
Reference/ Account no:				
Indicate applicable Complaint's category: (if known) with an "X"	Product unsuitable	<input type="checkbox"/>	Performance	<input type="checkbox"/>
	Person/ Rep	<input type="checkbox"/>	Payments/ collection	<input type="checkbox"/>
	Product/ Service Design	<input type="checkbox"/>	Complaint handling	<input type="checkbox"/>
	Fees/ Charges	<input type="checkbox"/>	Claims/ Non-payment	<input type="checkbox"/>
	Lack of Information	<input type="checkbox"/>	Product / Funds Accessibility	<input type="checkbox"/>
	Advice	<input type="checkbox"/>	Other	<input type="checkbox"/>
	Services	<input type="checkbox"/>		

OVERBERG ASSET MANAGEMENT (PTY) LTD.

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When did you first realise the problem:	
Did you complain before? Give date and person:	
Provide full details about the complaint or attach a letter providing the following: List in date order the phone calls meetings, or letters you have received or exchanged with the person against whom you are complaining.	
Reference of documents attached e.g. Annexures A, B etc. with descriptions:	
Client name and signature:	
Date signed:	
Contact details: <i>Overberg Asset Management:</i> <ul style="list-style-type: none">• <i>E-mail:</i> clientcomplaints@overberg.biz.• <i>Telephone (Winelands Office):</i> +27 (0)21 852 6040 <i>The Ombudsman:</i> <ul style="list-style-type: none">• <i>Physical address:</i> Kasteel Park Office Park, Orange Building, 2nd floor, c/0 Nossob & Jochemus Street, Erasmus Kloof, Pretoria, 0048• <i>Postal address:</i> PO Box 74571, Lynwood Ridge, 0040• <i>E-mail:</i> info@faisombud.co.za <i>Telephone (Client contact division):</i> +27 12 470 9080/ +27 12 762 5000	