

Letter of introduction

1. Financial planner

Name and surname	<input type="text"/>
Telephone	<input type="text"/>
E-mail address	<input type="text"/>

The financial planner has been mandated by Momentum Financial Planning as a representative on our license. Our financial planners operate in an office environment and a personal assistant may from time-to-time attend to general policy enquiries on your behalf. Such information is always treated in strict confidentiality.

2. Financial services provider

Momentum is a registered Financial Services Provider (FSP) and authorised to provide financial services for these products:

- Long-term Insurance subcategory A
- Long-term Insurance subcategory B1
- Long-term Insurance subcategory B1-A
- Long-term Insurance subcategory B2
- Long-term Insurance subcategory B2-A
- Long-term Insurance subcategory C
- Short-term Insurance Personal Lines
- Short-term Insurance Personal Lines A1
- Short-term Insurance Commercial Lines
- Retail Pension Benefits
- Pension Fund Benefits
- Money market instruments
- Shares
- Derivative instruments
- Participatory interests in a collective investment scheme
- Participatory interest in a hedge fund
- Short-term Deposits
- Structured Deposits
- Health Service Benefits

Momentum is part of Momentum Metropolitan Life Limited, an authorised financial services provider (FSP6406) and registered credit provider (NCRCP173).

Head office

268 West Avenue, Centurion 0157
T (012) 671 8911 or (087) 742 7547

Postal address

P.O. Box 7400, Centurion 0046
www.momentum.co.za

3. Contractual relationship and conflict of interest

A contractual relationship exists between Momentum and the financial planner. In terms of this agreement, the financial planner is authorised to render financial services to clients on behalf of Momentum. Momentum accepts responsibility for the activities of the financial planner insofar as they are performed within the scope of that agreement.

As a representative of Momentum, the financial planner receives remuneration from Momentum only and as a result may be eligible for special bonuses and awards for producing business volumes above specified targets for the financial products of Momentum and its affiliated product suppliers. Momentum has a conflict of interest management policy that is available on www.momentum.co.za.

4. Financial services and product suppliers

The financial planner may only recommend products from suppliers affiliated to Momentum, or suppliers with whom Momentum has concluded a general agency agreement. A product supplier means a company or division that issues financial products under a regulatory authority. These products are recommended to clients under only the brand names of Momentum, Momentum Trust, and Guardrisk. They are risk benefits, savings, investments, retirement funds, linked investments (unit trusts), short-term insurance (including Momentum gap cover and other products underwritten by Guardrisk), healthcare products and Multiply. In addition, our financial planners may assist you with wills and trusts.

5. Professional indemnity and fidelity insurance cover

Momentum is insured against claims from professional negligence, errors and omissions on the part of its financial planners, but does not hold any other guarantees.

6. Compliance department and complaints procedures

Momentum maintains a comprehensive complaints resolution system. Details are available on the Momentum website at www.momentum.co.za.

Our complaints department may be contacted at:

Telephone: 012 671 8911
Email: clientcomplaints@momentum.co.za

Momentum Financial Planning
268 West Avenue, Centurion, 0046

7. Client declaration

By signing the declaration, I confirm I have received a copy of the letter of introduction, the content of the document was explained to me and I understand the content:

- The financial planner's personal details and those of Momentum;
- The financial planner's legal and contractual status in relation to Momentum;
- The financial services that the financial planner is authorised to provide;
- That Momentum holds professional indemnity cover in respect of the actions of its financial planners; and
- The contact details of Momentum's complaints department and where the details of a complaints procedure may be obtained from.

Client's name

Signature of client or person duly authorised to represent the client

Date

Momentum 268 West Avenue Centurion 0157
PO Box 7400 Centurion 0046 South Africa
ShareCall 0860 66 23 45 www.momentum.co.za

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