

Protecting and
preserving
financial
wellness for
employees

FundsAtWork

Smart exit process for employer portal

October 2016

At Momentum we are always innovating and looking for ways to improve our processes and make our clients' lives easier. With that in mind we've developed a new facility that helps employees to **digitally manage their financial wellness** when they leave their employer. This new facility will be rolled out to FundsAtWork clients early in 2017.

The facility is an exciting enhancement to our existing FundsAtWork employer portal. This is coupled with a new digital member experience, to guide them make the right decision for their financial wellness.



Benefits to employees

- Understand "What I have" and "What I need"
- Empowered to make better decisions
- Supported end-to-end
- Easy and quick process, no paperwork!



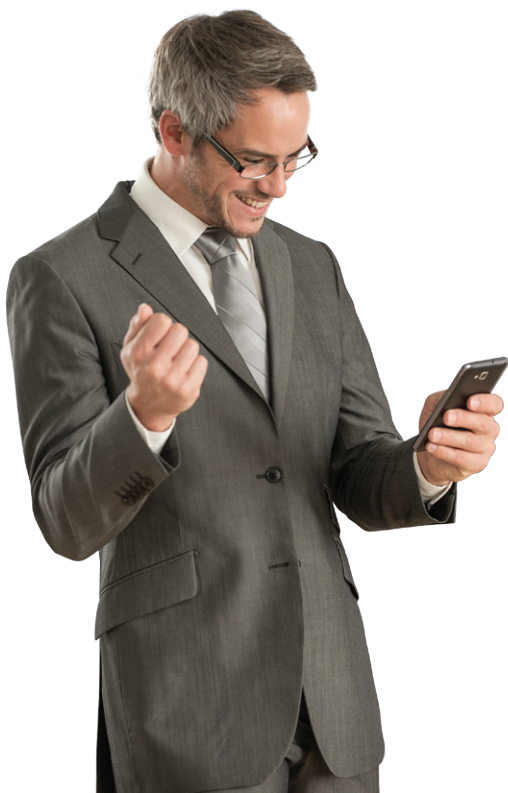
Benefits to the employer

- Reduced queries from members
- Reduced administration effort
- Empowered to support members



Benefits to broker

- Able to help employees at the right time
- Less process-related questions allows you to delve deeper into employee's needs



FundsAtWork
retirement savings



FundsAtWork
death benefits



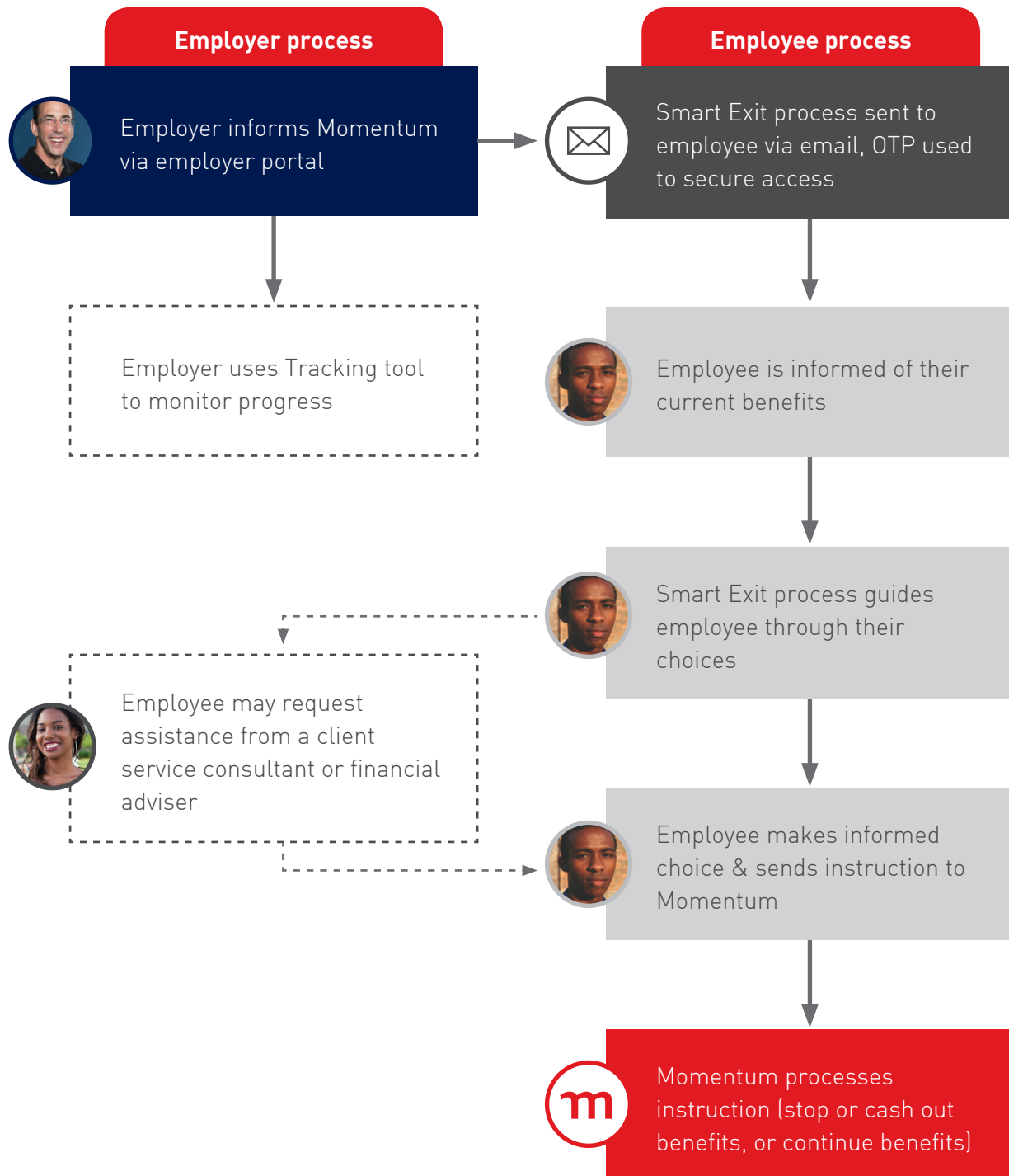
FundsAtWork
disability benefits

momentum
health

multiply

Smart Exit Process

High level overview



User friendly digital interface

Employees can complete the process on a computer or laptop, or any mobile device such as a smart phone or tablet.

The employee can see how far they are in the process with these 4 steps.

All choices explained in full, together with an illustration of how this will affect their retirement.

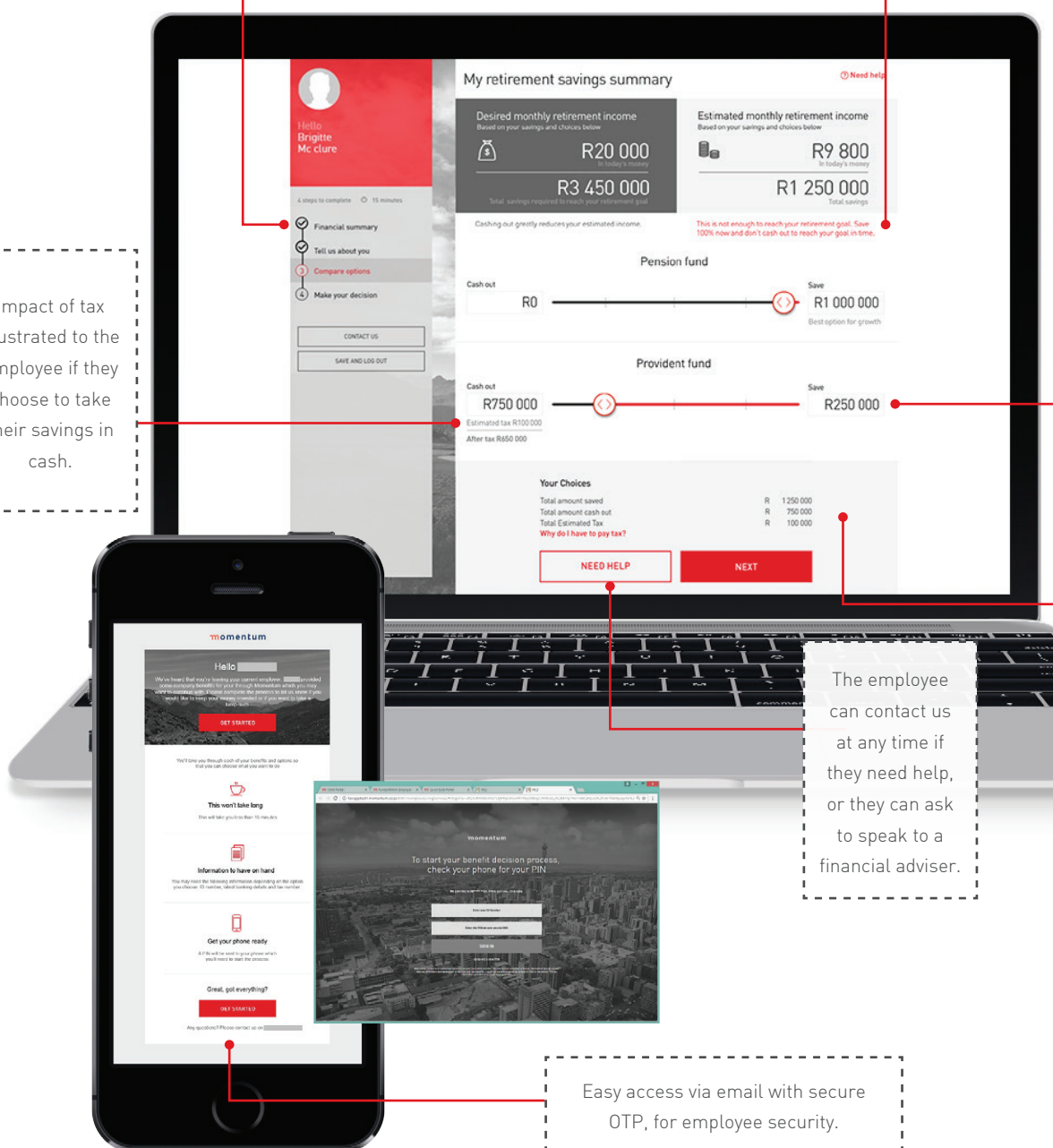
Impact of tax illustrated to the employee if they choose to take their savings in cash.

Easy-to-use sliders help the employee see the impact of their decision.

The employee can contact us at any time if they need help, or they can ask to speak to a financial adviser.

Full integration into FundsAtWork's claims processes with full automation of cash payments and preservations. No need for forms and paperwork.

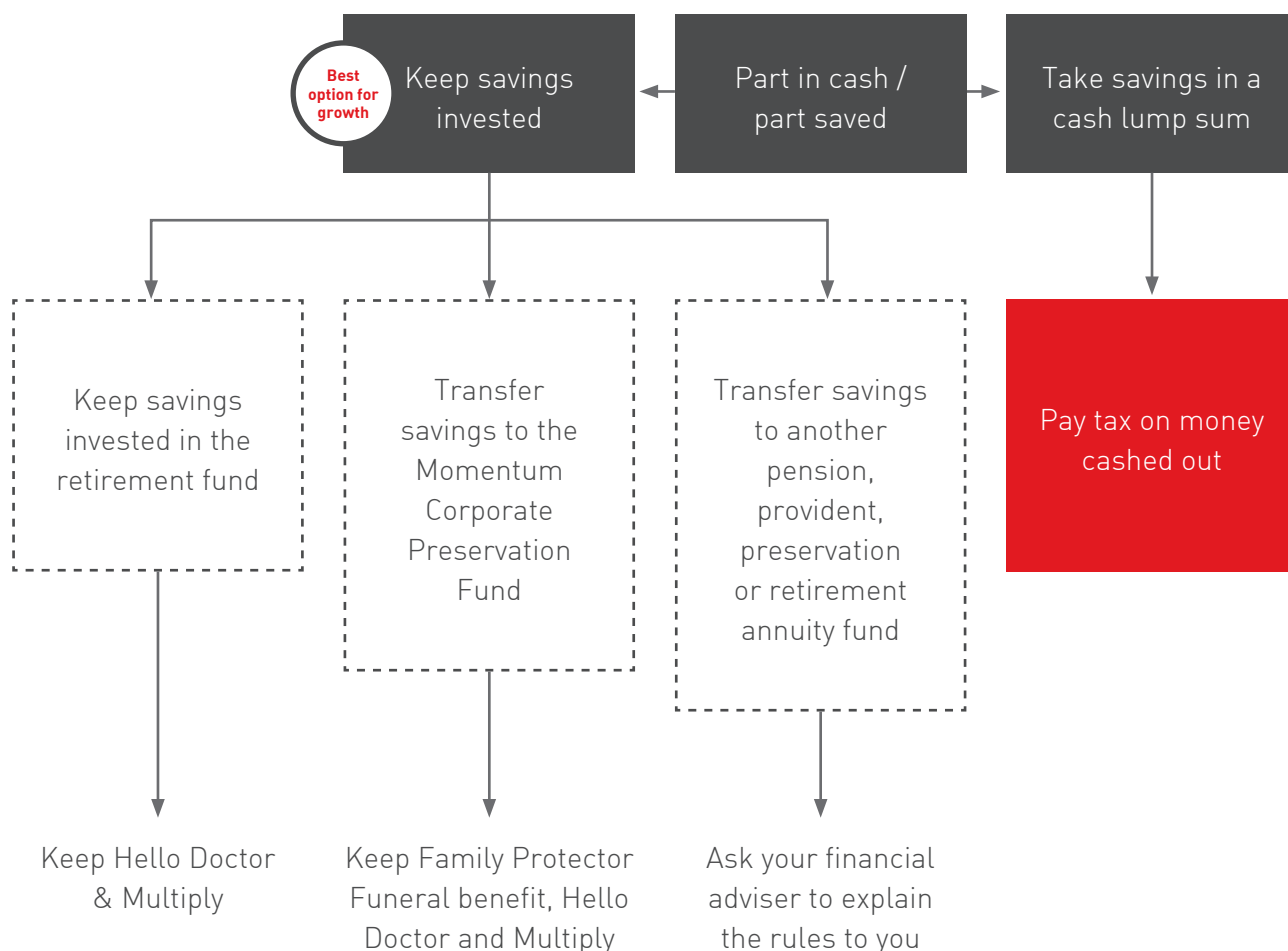
Easy access via email with secure OTP, for employee security.



Smart Exit Process

Employee choices

Retirement savings - Your choices*



Insurance benefits – Convert these to individual policies. Ask for a quote.

Momentum Health – Remain a member of the medical scheme.

Multiply – Keep Multiply if you keep another Momentum product.



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