

## FundsAtWork Conversion option form

The conversion option gives qualifying members the opportunity to take out individual insurance benefits that are similar to their group insurance benefits with Momentum Myriad, when their group scheme benefits stop. The individual insurance benefits will be based on Momentum's current product range that, in Momentum's opinion, is best suited to continue the cover.

To be completed by member and member's spouse if applicable.

**Member number**

Please fill in this form in the fields provided. Use the tab key to move from one field to the next.

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### Section 1a: Member's details

Title  Initial(s)  First name(s)

Surname

Date of birth   -   -

RSA ID Yes  No  ID/passport number

Passport country of origin

Employer's name

Monthly salary R  Date of leaving service   -   -

Telephone - work  Fax number

Telephone - home  Cellphone number

Email address

Education level Not matriculated  Matriculated  Diploma  Degree  Post Grad

Details of your qualification

Smoker status Smoker  Non-smoker

Marital status Single  Married  Divorced  Widow/er

Current occupation

### Section 1b: Spouse's details (to be completed for spouse's life cover, where the life insured is the spouse of the main member.)

Title  Initial(s)  First name(s)

Surname

Date of birth   -   -

RSA ID Yes  No  ID/passport number

Passport country of origin

Employer's name

Monthly salary R

Telephone - work  Fax number

Telephone - home  Cellphone number

Email address

Education level Not matriculated  Matriculated  Diploma  Degree  Post Grad

Details of your qualification

Smoker status Smoker  Non-smoker

Current occupation

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## Section 2: Confirmation (to be completed by service consultant)

Amount of cover available for conversion:

Life cover	R	<input type="text"/>	Income disability cover (PHI or DIB)	R	<input type="text"/>
Spouse's cover	R	<input type="text"/>	Critical illness cover	R	<input type="text"/>
Spouse and children's annuity (SAC) (capitalised amount)	R	<input type="text"/>	Critical illness benefit type	Stand alone benefit	<input type="checkbox"/>
Lump sum disability cover	R	<input type="text"/>			
Taper period	<input type="text"/>	Years			
Income disability (PHI):	Waiting period	<input type="text"/>	Months	Level of benefit	<input type="text"/>
	Termination age	<input type="text"/>	Years	Benefit escalation	<input type="text"/>
					%
					%

We are unable to provide the required information because:

<input type="checkbox"/> Member not on record	<input type="checkbox"/> Cover not available	<input type="checkbox"/> Employer terminated
<input type="checkbox"/> Member has PHI claim	<input type="checkbox"/> Scheme terminated	<input type="checkbox"/> Other

If other, please specify

Name of service consultant completing form	<input type="text"/>
Designation	<input type="text"/>
Telephone number (code - number)	<input type="text"/>
Signature	<input type="text"/>
Date	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> - 2 0 <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

## Section 3: Notes

- To qualify for the conversion option, you must be covered on a group scheme that makes provision for the conversion option, and you must be below the maximum age specified in the group scheme policy.
- You have 90 days from leaving your employer to inform us that you will take up the conversion option, provided that you are under the conversion option age stated in the group scheme policy. At the end of this 90 day period, Momentum Myriad's standard terms and conditions will apply.
- No medical underwriting is required except for a cotinine test at the underwriter's discretion.
- Financial, occupational and underwriting for hobbies will apply at the underwriter's discretion.
- You will be covered for 30 days under the group policy from your date of exit from the scheme.
- If you have insurance benefits at the time of leaving your current employer you can convert some of your benefits to an equivalent Myriad policy.
- The spouses and children's pension can only be continued with Myriad as a lump sum death benefit.
- Disability benefits that are continued with Myriad can only be continued with "own occupation", "functional impairment" or "activities of daily living definitions".
- Myriad only offers Comprehensive Critical Illness benefits. Essential dread disease can therefore only be continued with a product that covers a more inclusive list of conditions.

The following applies to all the individual policies:

- The level of cover is converted from a multiple or percentage of salary to a Rand amount.
- The level of cover remains fixed for the whole term.
- You cannot exercise the conversion option for an insurance benefit that you have claimed for.
- You will not be eligible for the Myriad Interactive benefit or any other discounts.
- No other features that exist on the individual policy will be added when you exercise the conversion option if you were not entitled to them in the group policy.
- You will get cover under the Myriad terms and conditions.

Completed form to be faxed to 012 675 3970 or emailed to [momentumcorporateclient@momentum.co.za](mailto:momentumcorporateclient@momentum.co.za).

A Momentum Corporate service consultant will then complete section 2 of this form and return it to your financial adviser to arrange a quote from Momentum Myriad.

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**When you sign this form by inserting a digital signature it confirms that the information provided is true and correct.**

**Options to sign the form:**

1. Print out the form, sign and scan it and send it back via email to [momentumcorporateclient@momentum.co.za](mailto:momentumcorporateclient@momentum.co.za) or fax it to +27 (0)12 675 3970.
2. Place your scanned signature in the signature block.
  - Store your scanned signature in a safe place on your computer.
  - Select the 'comments' tab from your menu in Adobe.
  - Select the 'add stamp' icon.
  - Select custom stamps.
  - Create custom stamps.
  - You can now browse and upload your signature to save it as a custom stamp under 'sign here' in Adobe.
  - You can now go back to your 'stamps' icon and select 'sign here' and select your saved signature.
  - Place it in the document and save the document.

When you want to print the form to complete by hand you can turn off the field highlights by selecting the "highlight existing fields" on the top right hand corner of your screen.