momentum

corporate

FundsAtWork Umbrella Funds

Financial adviser appointment form				
Se	ction A: E	mployer deta	nils	
Employer's full registered name				
Cor	ntact number			
Email address				
Se	ction B: F	inancial advi	ser's details	
I ap	point this financ	cial adviser to the s	cheme:	
Fina	ancial adviser n	ame		
Bro	ker code			
Bro	ker house name	е		
Broker house code				FSP number
Date of financial adviser appointment			D D - M M - Y Y Y	
Not •	The financial The financial	adviser and the bro	roker house must have a valid in-service oker house must have a FSP license. credited to provide advice on these prod	
	Category	Subcategory	Category description	
	1	3	Long-Term Insurance: Category B1	
	1	7	Pension Funds Benefits (excluding re	tail)
:	The managing director or financial director must sign this form. If this appointment is replacing the current financial adviser then any commission loan account balance for the current financial adviser will be clay back from them when the next contribution reconciliation is run.			
Signed at				
				D D - M M - Y Y Y

Date

Financial director

Signature

Designation
Name
Surname

Managing director

Options to sign the form:

- 1. Print out the form, sign and scan it and send it back via email to fawcommission@momentum.co.za.
- 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.