

FundsAtWork Umbrella Funds

Financial adviser appointment form

Section A: Employer details

Employer's full registered name

Contact number

Email address

Section B: Financial adviser's details

I appoint this financial adviser to the scheme:

Financial adviser name

Broker code

Broker house name

Broker house code FSP number

Date of financial adviser appointment - -

Notes:

- The financial advisers and the broker house must have a valid in-service contract with Momentum.
- The financial adviser and the broker house must have a FSP license.
- The financial adviser must be accredited to provide advice on these products.

Category	Subcategory	Category description
1	3	Long-Term Insurance: Category B1
1	7	Pension Funds Benefits (excluding retail)

- The effective date of the appointment is the 1st of the month following the date that we receive this form.
- 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 clawed back from them when the next contribution reconciliation is run.
- Email this form together with your letterhead to fawcommission@momentum.co.za and the scheme's administrator.

Signed at

- -

Signature

Designation

Date

Options to sign the form:

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