

Mr J Hans
Momentum Employee Benefits
PO Box 7400
Centurion
0046
Email: fawcommission@momentum.co.za

<Name> <Surname>
Tel:
Email:

Dear Julian

FundsAtWork – Broker Appointment

_____ (Registered name of employer) has appointed the following broker to our scheme.

Name of broker	<input type="text"/>
Broker code	<input type="text"/>
Broker house	<input type="text"/>
Broker house code	<input type="text"/>
FSP no	<input type="text"/>

The effective date of this broker appointment is _____.

Notes:

1. The broker and the broker house must have a valid in-service contract with Momentum.
2. The broker and the broker house must have a FSP license.
3. The broker must be accredited to provide advice on the relevant products.

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

4. The effective date of the appointment is the 1st of the month following the date of Momentum receiving this letter.
5. This letter must be signed by the managing director or financial director and must be emailed to fawcommission@momentum.co.za and copied to the scheme's administrator.
6. This letter must be printed on the employer's letterhead, so that we are able to verify the full name of the employer and the authorised signatory.
7. If this appointment is replacing the current broker then any commission loan account balance for the current broker will be clawed back from the current broker when the next contribution reconciliation is run.

Signed at

Date - - 20

Signature

Designation Managing Director / Financial Director