

Momentum Corporate Preservation Funds

Financial adviser appointment and once-off commission

Member number

Complete this form if you are appointing a financial adviser.

Please note that Section 4 must be completed for once-off commission to financial advisers.

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 1: Current fund details

Type of fund Momentum Corporate Pension Preservation Fund Momentum Corporate Provident Preservation Fund

Section 2: Member details

Title Initial/s

First name

Surname

Date of birth

D	D	-	M	M	-	Y	Y	Y	Y
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RSA ID Yes No Identity / Passport number

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Passport country of origin

Telephone - work Fax

Telephone - home Cell phone

Personal email address

Section 3: Financial adviser details

Title Initial/s

First name

Surname

Date of birth

D	D	-	M	M	-	Y	Y	Y	Y
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RSA ID Yes No Identity / Passport number

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Passport country of origin

Telephone - work Fax

Cellphone number Cell phone

Financial adviser code Financial adviser house code

Email address

Section 4: Commission paid to financial adviser

Financial adviser commission may be payable if agreed between the member and the financial adviser.

I authorise that the financial adviser be paid the following commission:

Once-off commission capped at 1,5% of the transfer value. % of amount transferred

I agree that Momentum Corporate may process all information that I provide on this form. I understand that the information will be processed in accordance with the Protection of Personal Information Act, 2013 and Momentum Corporate's strict policies on protecting the confidentiality of my personal information.

I agree that Momentum Corporate may use my personal information to provide and administer retirement fund investment and insurance products and share my personal information with Momentum Corporate's partners and contracted service providers, who are legally bound to protect the information.

[Click here](#) to read the full consent document.

(The maximum commission on a preservation fund is 1.5 percent (excluding VAT) of the amount transferred.)

Member's 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"/>
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Completed form to be faxed to 012 675 3970 or emailed to fawpreservationfund@momentum.co.za.

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 fawpreservationfund@momentum.co.za, call 086 055 5572 or fax it to Fax +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.