momentum multiply

Declaration of Financial Review and Product Coverage

Date	D D - M M - Y Y	YY
Email this completed and signed form t	to multiply@momentum.co.za or for qu	ueries call 0861 88 66 00
Financial Adviser details		
Company name		
FSB number		
Adviser name		
Adviser surname		
Adviser ID number		
Main member details Title	Initial/s	First name
Surname		
ID/Passport number	Y Y M M D D	Date of birth D D - M M - Y Y Y Y
 Are you currently meeting all your debt repayments? 	Unknown Yes	
2. Have you been saving for emergencie	es? Unknown Yes	No
Section 1: Advice Provided Risk Cover Life cover		Section 2: Product Coverage Risk Cover Life cover
Critical Illness cover		Critical Illness cover
Disability cover		Disability cover
Funeral cover		Funeral cover
Car and home cover		Car and home cover
Household content insurance		Household content insurance
Building insurance		Building insurance
Vehicle insurance		Vehicle insurance
Health		Health
Medical Aid		Medical Aid
Hospital Plan		Hospital Plan
Wills		Wills
Wills		Wills
Retirement		Retirement
Retirement annuity		Retirement annuity
Pension fund		Pension fund
Provident fund		Provident fund
Living & life annuities		Living & life annuities
Preservation fund		Preservation fund
Savings		Savings

Non-compulsory savings

Endowments

Investments

Savings

Non-compulsory savings

Endowments Investments

Partner details

Complete only in case of family membersh	ip																								
Title] Ir	nitial/	s]	First ı	name													
Surname																									
ID/Passport number	ΥΥ	Μ	Μ	D	D							Da	ate of	birth		D	D] -	Μ	Μ] -	Y	Y	Y	Y
 Are you currently meeting all your debt repayments? Have you been saving for emergencies? 		knowi knowi				Yes Yes			No No																
Section 1: Advice Provided Risk Cover									e ctio k Cov		2: Pr	oduc	t Co	over	age	е		7							
Life cover								Life	e cove	r															
Critical Illness cover								Cri	tical I	llne	SS CO	/er													
Disability cover								Dis	ability	у сс	over]							
Funeral cover								Fur	neral o	cove	er														
Car and home cover								Ca	r and	hor	ne co	ver						_							
Household content insurance								Но	useho	old o	conte	nt insu	rance												
Building insurance	Building insurance			Bui	Building insurance																				
Vehicle insurance								Ve	nicle i	nsu	rance														
Health								He	alth									_							
Medical Aid								Me	edical	Aid	ł														
Hospital Plan								Ho	spital	Pla	n]							
Wills								Wi	lls									_							
Wills								Wi	lls																
Retirement								Re	tirem	ent								7							
Retirement annuity								Ret	ireme	enta	annui	ty													
Pension fund								Per	nsion	fun	d														
Provident fund								Pro	viden	t fu	nd														
Living & life annuities								Liv	ing &	life	annu	ities]							
Preservation fund								Pre	serva	tior	n fund														
Savings								Sa	vings									_							
Non-compulsory savings								No	n-con	npu	lsory	saving	S												
Endowments								End	dowm	ient	S]							
Investments								Inv	estme	ents	5]							

Adviser Declaration

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_ hereby declare as follows:

- 1. That I have provided financial advice to the Multiply member(s) in respect of the categories indicated above, and that this declaration is for the sole purpose of awarding Multiply points to the member(s);
- 2. I further understand that Momentum Multiply (PTY) Ltd will in this regard not be held accountable for the intermediary's compliance with any of the provisions of the Financial Advisory and Intermediary Act including but not limited to the rendering of advice as amplified in the General Code of Conduct for Authorized Financial Services Providers and Representatives;
- 3. I warrant that the financial advice provided meets the requirements set in Part VII of the General Code of Conduct for Authorized Financial Services Providers and Representatives;
- 4. I undertake to provide proof of the financial advice provided to Momentum Multiply (PTY) Ltd on request.

Signed at	on this day of	_20
Financial Adviser		

Momentum Multiply (Pty) Ltd, 268 West Avenue, Centurion, 0157, PO Box 7400, Centurion, 0046, South Africa.Tel +27 (0)12 671 8911, Fax +27 (0)12 675 3911, multiply@momentum.co.za, multiply.co.za. Momentum Multiply (Pty) Ltd is part of Momentum Metropolitan Holdings Limited. Reg. No. 1971/006353/07

E & OE. Terms and conditions apply. Visit multiply.co.za for full details.