

Declaration of Financial Review and Product Coverage

Date - -

Email this completed and signed form to multiply@momentum.co.za or for queries 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 Date of birth - -

1. Are you currently meeting all your debt repayments? Unknown Yes No

2. Have you been saving for emergencies? Unknown Yes No

Section 1: Advice Provided

Risk Cover

Life cover

Critical Illness cover

Disability cover

Funeral cover

Car and home cover

Household content insurance

Building insurance

Vehicle insurance

Health

Medical Aid

Hospital Plan

Wills

Wills

Retirement

Retirement annuity

Pension fund

Provident fund

Living & life annuities

Preservation fund

Savings

Non-compulsory savings

Endowments

Investments

Section 2: Product Coverage

Risk Cover

Life cover

Critical Illness cover

Disability cover

Funeral cover

Car and home cover

Household content insurance

Building insurance

Vehicle insurance

Health

Medical Aid

Hospital Plan

Wills

Wills

Retirement

Retirement annuity

Pension fund

Provident fund

Living & life annuities

Preservation fund

Savings

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Partner details

Complete only in case of family membership

Title	<input type="text"/>	Initial/s	<input type="text"/>	First name	<input type="text"/>												
Surname	<input type="text"/>																
ID/Passport number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Date of birth												
	Y	Y	M	M	D	D	-	D	D	-	M	M	-	Y	Y	Y	Y

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Adviser Declaration

I _____ hereby declare as follows:

- 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);
- 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;
- 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;
- 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