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Financial Planning Institute of Southern Africa

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- Retail pension benefits
- Pension funds benefits (excluding retail)
- Securities and instruments: Shares
- Securities and instruments: Money market instruments
- Securities and instruments: Derivative instruments excluding warrants
- Participatory interests in collective investment schemes

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Contractual relationship and conflict of interest

The financial planner is a representative of Momentum and as such he/she earns all his/her commission and/or remuneration from Momentum. The financial planner becomes eligible for special bonuses and awards if he/she is able to provide financial services above a specified limit for the financial products that MMI Group and its affiliated product suppliers offer.

Financial services and product suppliers

Financial services refer to the provision of financial advice and/or intermediary services, which include financial planning.

Financial planning is a process that evaluates your current financial position against your financial goals and objectives. It is a written plan of action that recommends steps to address shortfalls and excesses, and proposes appropriate financial products to give effect to it.

The financial planner may only recommend products from suppliers affiliated to Momentum, or suppliers with whom Momentum has concluded a general agency agreement. A product supplier means a company or division that issues financial products under a regulatory authority.

These products are recommended to clients only under the brand names of the MMI Group Limited licences. They are risk benefits, savings, investments, retirement funds, linked investments (unit trusts), short-term insurance, healthcare, wills and trusts.

Professional indemnity and fidelity guarantee

Momentum is insured for claims against it, arising from professional negligence, errors and omissions on the part of its financial planners and also against dishonesty. Momentum does not hold any other guarantees.

Compliance department and complaints procedures

Momentum maintains a comprehensive complaints resolution system. Details are available on the Momentum website at www.momentum.co.za. The contact details of the complaints department is available in the complaints resolution document.

Our compliance department can be contacted at:

MMI Group Ltd, 268 West Avenue, Centurion, 0046

Telephone number: 087 742 9182

E-mail address: ClientComplaints@momentum.co.za

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