

ANNEXURE "D": CUSTOMISED BENEFIT STATEMENT



101 - Version: - Draft

Prepared for:

Partner Name: OMW
Contact Person: Alida
Tel:
Email:
Type: Strategic Partner
Date: 10 February 2016

Prepared by:

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Financial Planning Services

Services are delivered per planner and include 1 support staff per planner

Planner Name	Service Option	Year 1	On-going
N/A	N/A	0	0
Total		0	0

Business Management Services

Services are delivered per practice

Service Option	Year 1	On-going
Consulting Premier (High)	8,500	5,000
Total	8,500	5,000

Consulting Premier (High)

- Access to selected online courses and business tools via www.knowmore.co.za.
- All courses, business tools and Wealth Intelligence online offer CPD points.
- Courses are aimed at financial planners as well as support staff.
- Business tools include gap analyses that test the practice's ability to implement and manage specific legislation, including RDR, TCF and PoPI.
- An annual Business Assessment Test license.
- An annual Client Satisfaction Survey.
- One-on-one coaching sessions with a Business Coach (20 hours in year 1, thereafter 10 hours per year).
- Option to purchase additional coaching hours (in bundles of 10) via www.knowmore.co.za.

Old Mutual Wealth Xplan Multi-site (CRMIntegrator)

Services are delivered per practice

Service Option	Year 1	On-going
X Plan OMW Multi-site	27,000.00	12,000.00
Total	27,000	12,000

X Plan OMW Multi-site

- Access to the Old Mutual Wealth Xplan CRMIntegrator application that is integrated with the Old Mutual Wealth Integrator financial planning tool (the fee excludes the Iress license fee).
- Co-ordination of data migration to our application, practice site set up and set up of integration functionality,
- Onsite, post-data migration training and embedding of Xplan in the practice.
- Implementation of practice management processes, communication plan implementation.
- Ongoing, telephonic support with regards to the CRMIntegrator.
- The ability to benefit from basic site customisation.
- The ability to benefit from additional customisation on the multi-site, based on a majority vote, on a fee sharing basis.
- Any customisation / configuration on a practice level of the multi-site can be facilitated on a time and materials basis, depending on resource availability.

CRMIntegrator Support hours

- The Xplan Multi-Site is supported via the Business Integration Consulting Service.
- You will be assigned a dedicated Integration Consultant.
- The support hours are during normal working hours, from 08:30 to 17:00 during weekdays, excluding public holidays.
- The Xplan Multi-site is generally available 24x7, except during planned maintenance.

Annexure D: Partner Program Customized Benefit Statement

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Partner Name: OMW
Contact Person: Alida
Type: Strategic Partner

Service Details	Fees Year 1	Fees On-going
- N/A	0.00	0.00
Business Management Services (BMS) - Consulting Premier (High) - Year 1	8,500	5,000
Old Mutual Wealth Xplan Multi-site (CRMIntegrator)	27,000	12,000
Sub Total	35,500	17,000
Less 10% (Strategic Partner Discount)	-3,550	-1,700
Total	31,950	15,300
Monthly Debit Order Amount	2,663	1,275
Average monthly fee per Planner	2,663	1,275

* All pricing includes V.A.T @14% Year 1(R 3,924) On-going (R 1,879.00)

Commencement date year 1: _____

Commencement date ongoing: _____

Signed at _____ on this _____ day of _____

Annexure prepared by: Andrew