



ANNEXURE "D": CUSTOMISED BENEFIT STATEMENT DRAFT PROPOSAL

423423 - Version: 1 - Draft

Prepared for:

Name: ffggss
Contact Name: eer
Tel:
Type: Partner
Date: 9 March 2016

Prepared by:

Old Mutual Wealth Services Company (Pty) Ltd
Reg No. 2012/100073/07
Prepared By: Andrew
andrew@ds2.co.za

SERVICE DETAILS

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	n/a	n/a
Total		0	0

BUSINESS MANAGEMENT SERVICES

Services are delivered per practice

Service Option	Year 1	On-going
n/a	n/a	n/a
Total	0	0

OLD MUTUAL WEALTH XPLAN MULTI-SITE (CRM-INTEGRATOR)

Services are delivered per practice

Service Option	Year 1	On-going
n/a	n/a	n/a
Total	0	0

ADDITIONAL LICENSES

Name	Business Assessment (BAT) (R0 per License)	Client Survey (CSS) (R0 per License)
n/a	n/a	n/a
Totals		

FEE SUMMARY

Prepared for

Name: ffgggss

Contact Person: eer

Type: Partner

Service Details	Fees Year 1	Fees On-going
Financial Planning Services		
n/a	n/a	n/a
Business Management Services (BMS)		
n/a	n/a	n/a
Old Mutual Wealth Xplan Multi-site (CRMIntegrator)		
n/a	n/a	n/a
Additional Licenses		
n/a	n/a	n/a
Total	0	0
Monthly Debit Order Amount	0	0
Average monthly fee per Planner	n/a	n/a

* All pricing includes V.A.T @14% Year 1 (R 0.00) On-going (R 0.00)

Commencement date Year 1: _____

Commencement date On-going: _____

Signed by _____ at _____ on this _____ day of _____