



ANNEXURE "D": CUSTOMISED BENEFIT STATEMENT

Prepared for:

Name: Dan Snyder
Contact: Dan Snyder
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Tel: 0833384658
Type: Partner
Date: 9 February 2017

Prepared by:

Old Mutual Wealth Services Company (Pty) Ltd
Reg No. 2012/100073/07
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FEE SUMMARY

Prepared for

Name: Dan Snyder

Contact Person: Dan Snyder

Type: Partner

Service Details	Fees Year 1	Fees Ongoing
Financial Planning Services		
Dan Snyder - IWP Introduction Programme (Low) - Year 1	5,800	3,200
Business Management Services (BMS)		
Consulting Standard (Medium) - Year 1	6,000	4,000
Additional Licenses		
n/a	0	0
Old Mutual Wealth Xplan Multi-site (CRMIntegrator)		
n/a	0	0
Total	11,800	7,200
Monthly debit order amount	983	600
Average monthly fee per planner	983	600

* All pricing includes VAT @14% Year 1 (R 1,449.12) Ongoing (R 884.21)

Commencement date year 1: 2017-03-01

Commencement date ongoing: 2018-03-01

Signed by: _____ **Signature:** _____

At _____ **on this** _____ **day** _____

SERVICE DETAILS

FINANCIAL PLANNING SERVICES

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

Planner Name	Service Option	Year 1	Ongoing
Dan Snyder	IWP Introduction Programme (Low)	5,800	3,200
Total		5,800	3,200

IWP Introduction Programme (Low)

- Access to a one day Integrated Wealth Planning (IWP) Induction Workshop. (Unless maintenance option is selected).
- On-going telephonic support delivered.
- Practice branded financial plan and engagement letter.
- Wealth Integrator license.
- Qualifying planners have option to obtain IWP designation and, in doing so, become a member of the Community and appear on Old Mutual Wealth's "Find a planner" website.

Wealth Integrator Support hours

- The Wealth Integrator is supported via the OM Wealth Service Centre (0860 999 199).
- The support hours are from 08:00 to 18:00 during weekdays, excluding public holidays.
- The Wealth front-end is generally available 24x7, except during planned maintenance, but is dependent on back-end services that are typically unavailable between 21:00 and 07:00 to allow for back-ups and batch processing.

BUSINESS MANAGEMENT SERVICES

Services are delivered per practice

Service Option	Year 1	Ongoing
Consulting Standard (Medium)	6,000	4,000
Total	6,000	4,000

Consulting Standard (Medium)

- 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 (10 hours in year 1, thereafter 5 hours per year).
- Option to purchase additional coaching hours (in bundles of 10) via www.knowmore.co.za.

ADDITIONAL LICENSES

Name	Business Assessment (BAT) (R0 per License)	Client Survey (CSS) (R0 per License)
n/a	0	0
Totals	0	0

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

Services are delivered per practice

Service Option	Year 1	Ongoing
n/a	0	0
Total	0	0