



ANNEXURE "D": CUSTOMISED BENEFIT STATEMENT

Prepared for:

Name:
Contact:
Email:
Tel:
Type:
Date:

6 December 2018

Prepared by:

Old Mutual Wealth Services Company (Pty) Ltd
Reg No. 2012/100073/07
Prepared By:
Email:

FEE SUMMARY

Prepared for

Name:

Contact Person:

Type:

Service Details	Fees Year 1	Fees Ongoing
Financial Planning Services		
n/a	0	0
Business Management Services (BMS)		
n/a	0	0
Additional Licenses		
n/a	0	0
Old Mutual Wealth Xplan Multi-site		
n/a	0	0
Total	0	0
Monthly debit order amount	0	0
Average monthly fee per planner	0	0

All pricing includes VAT @14% Year 1 (R 0.00) Ongoing (R 0.00).

*Integrated Behavioural Coaching Course (Cape Town): R10 000. Note that the fees for the above course, R10 000 per person (including VAT), will be deducted by means of an additional debit order, over 12 months, at a rate of R833.33 per person per month, starting in December 2018 and ending in November 2019.

Commencement date year 1: _____

Commencement date ongoing: _____

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
n/a	n/a	0	0
Total		0	0

BUSINESS MANAGEMENT SERVICES

Services are delivered per practice

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

ADDITIONAL LICENSES

Name	Business Assessment (BAT) (R500 per License)	Client Survey (CSS) (R1,000 per License)
n/a	0	0
Totals	0	0

OLD MUTUAL WEALTH XPLAN MULTI-SITE

Services are delivered per practice

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