ANNEXURE "D": CUSTOMISED BENEFIT STATEMENT DRAFT PROPOSAL

cccccccccccccccc - Version: 1 - Draft

Prepared for:

Name:	Alida & Esme CC
Contact Name:	cccccccccccccccccccccc
Tel:	
Type:	Partner
Date:	14 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 planer and include 1 support staff per planner

Planner Name	Service Option	Year 1	On-going
xxxxxxxxxxxxxxxxxxxx	IWP Training Program (Medium)	7,800	3,500
	Total	**7,800**	**3,500**

IWP Training Program (Medium)

- Access to a one day Integrated Wealth Planning (IWP) Induction Workshop.
- On-going telephonic support delivered.
- Practice branded financial plan and engagement letter.
- Wealth Integrator license.
- Access to a series of workshops to deepen your understanding of IWP. A total of 6 workshops will be held in the major regions over a period of 18 months and include topics such as: Coaching Conversations, Initial Engagement, Goal Setting, Developing Scenarios, Review, Wealth Integrator).
- 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	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 (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)
ccccccccccccc	No	Yes
Totals		**1,000**

FEE SUMMARY

Prepared for

Name: Alida & Esme CC

Contact Person: cccccccccccccccccccccc

Type: Partner

Service Details	Fees Year 1	Fees On-going
Financial Planning Services		
xxxxxxxxxxxxxxxxxxxxx - IWP Training Program (Medium) - Year 1	7,800	3,500
Business Management Services (BMS)		
Consulting Premier (High) - Year 1	8,500	5,000
Old Mutual Wealth Xplan Multi-site (CRMIntegrator)		
n/a	n/a	n/a
Additional Licenses		
Client Survey (CSS) - ccccccccccccc	1,000	-
Total	**17,300**	**8,500**
Monthly Debit Order Amount	**1,442**	**708**
Average monthly fee per Planner	**1,442**	**708**

* All pricing includes V.A.T @14% Year 1 (R 2,124.56) On-going (R 1,043.86)

Commencement date Year 1: ________________________

Commencement date On-going: ________________________

Signed by ______________________ at ______________ on this ____________ day of ____________