ANNEXURE "D": CUSTOMISED BENEFIT STATEMENT

Prepared for:

Name:	Convergency Wealth
Contact:	Eddie Theron
Email:	eddie.theron@convergencywealth.co.za
Tel:	+27 21 201 7400
Type:	Strategic Partner
Date:	7 March 2019

Prepared by:

Old Mutual Wealth Services Company (Pty) Ltd

Reg No.	2012/100073/07
Prepared By:	Craig Lawrence
Email:	Craig.Lawrence@omwealth.co.za

FEE SUMMARY

Prepared for

Name:	Convergency Wealth
Contact Person:	Eddie Theron
Type:	Strategic Partner

Service Details	Fees Year 1	Fees Ongoing
Financial Planning Services		
Eddie - IWP Introduction & Training - Maintenance	3,900	3,900
Business Management Services (BMS)		
BMS Diagnostic - Maintenance	2,600	2,600
Additional Licenses		
n/a	0	0
Old Mutual Wealth Xplan Multi-site		
n/a	0	0
Sub Total	**6,500**	**6,500**
Less 10% (Strategic Partner Discount)	**-650**	**-650**
Total	**5,850**	**5,850**
Monthly debit order amount	**488**	**488**
Average monthly fee per planner	**488**	**488**

All pricing includes VAT @15% Year 1 (R 763.04) Ongoing (R 763.04).

*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: 2018-06-01

Commencement date ongoing: 2019-06-01

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
Eddie	IWP Introduction & Training	3,900	3,900
	Total	**3,900**	**3,900**

IWP Introduction & Training

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

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
BMS Diagnostic	2,600	2,600
Total	**2,600**	**2,600**

BMS Diagnostic

- 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.

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**