

ANNEXURE "D": CUSTOMISED BENEFIT STATEMENT PROPOSAL



Piet - Version: 1 - Proposal

Prepared for:

Partner Name: Es Practice
Contact Person: xxxx
Tel:
Email:
Type: Strategic Partner
Date: 26 February 2016

Prepared by:

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Financial Planning Services

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

Planner Name	Service Option	Year 1	On-going
P1	IWP Introduction Program (Low)	3,200	3,200
P2	IWP Coaching Program (High)	7,500	7,500
P3	IWP Training Program (Medium)	7,800	3,500
P4	IWP Training Program (Medium)	7,800	3,500
P5	IWP Training Program (Medium)	7,800	3,500
P6	IWP Introduction Program (Low)	3,200	3,200
P7	IWP Training Program (Medium)	3,500	3,500
P8	IWP Coaching Program (High)	14,000	7,500
P9	IWP Introduction Program (Low)	5,800	3,200
Piet	IWP Training Program (Medium)	3,500	3,500
Total		64,100	42,100

IWP Introduction Program (Low)

- 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.

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.

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.

IWP Coaching Program (High)

- 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).
- One-on-one coaching sessions with a Financial Planning Coach (25 hours in year 1, thereafter 10 hours per year).
- Development of customised financial planning documentation and process, together with the Financial Planning Coach.
- Option to purchase additional coaching hours (in bundles of 10) via www.knowmore.co.za.

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 (CRMIntegrator)

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) (R500 per License)	Client Survey (CSS) (R1,000 per License)
P2	No	Yes
P3	Yes	No
P4	Yes	Yes
Totals	1,000	2,000

Annexure D: Partner Program Customized Benefit Statement

Prepared for:

Partner Name: Es Practice
Contact Person: xxxx
Type: Strategic Partner

Service Details	Fees Year 1	Fees On-going
Financial Planning Services		
P1 - IWP Introduction Program (Low) - Maintenance	3,200	3,200
P2 - IWP Coaching Program (High) - Maintenance	7,500	7,500
P3 - IWP Training Program (Medium) - Year 1	7,800	3,500
P4 - IWP Training Program (Medium) - Year 1	7,800	3,500
P5 - IWP Training Program (Medium) - Year 1	7,800	3,500
P6 - IWP Introduction Program (Low) - Maintenance	3,200	3,200
P7 - IWP Training Program (Medium) - Maintenance	3,500	3,500
P8 - IWP Coaching Program (High) - Year 1	14,000	7,500
P9 - IWP Introduction Program (Low) - Year 1	5,800	3,200
Piet - IWP Training Program (Medium) - Maintenance	3,500	3,500
Business Management Services (BMS)		
Consulting Premier (High) - Year 1	8,500	5,000
Old Mutual Wealth Xplan Multi-site (CRMIntegrator)		
n/a	0	0
Additional Licenses		
Business Assessment (BAT) - P3	500	500
Business Assessment (BAT) - P4	500	500
Client Survey (CSS) - P2	1,000	1,000
Client Survey (CSS) - P4	1,000	1,000
Sub Total	75,600	50,100
Less 10% (Strategic Partner Discount)	-7,560	-5,010
Less 20% (Volume Discount II)	-15,120	-10,020
Total	52,920	35,070
Monthly Debit Order Amount	4,410	2,923
Average monthly fee per Planner	441	292

* All pricing includes V.A.T @14% Year 1 (R 6,498.95) On-going (R 4,306.84)

Commencement date Year 1: 2016-02-29

Commencement date On-going: 1970-01-01

Signed at _____ on this _____ day of _____

Annexure prepared by: Andrew