

ANNEXURE "D": CUSTOMISED BENEFIT STATEMENT DRAFT PROPOSAL



Proposal Chrome - Version: - Draft

Prepared for:

Partner Name: chromium
Contact Person: chrome dome
Tel:
Email:
Type: Partner
Date: 19 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
planner 1	IWP Training Program (Medium)	3,500	3,500
planner 2	IWP Introduction Program (Low)	3,200	3,200
Total		6,700	6,700

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.

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)	5,000	5,000
Total	5,000	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)
licence 1	Yes	No
licence 1	Yes	Yes
Totals	1,000	1,000

Annexure D: Partner Program Customized Benefit Statement

Prepared for:

Partner Name: chromium
Contact Person: chrome dome
Type: Partner

Service Details	Fees Year 1	Fees On-going
Financial Planning Services		
planner 1 - IWP Training Program (Medium) - Maintenance	3,500	3,500
planner 2 - IWP Introduction Program (Low) - Maintenance	3,200	3,200
Business Management Services (BMS)		
Consulting Premier (High) - Maintenance	5,000	5,000
Old Mutual Wealth Xplan Multi-site (CRMIntegrator)		
N/A	N/A	N/A
Additional Licenses		
Business Assessment (BAT) - 2 Licenses	1,000	1,000
Client Survey (CSS) - 1 License	1,000	1,000
Total	13,700	13,700
Monthly Debit Order Amount	1,142	1,142
Average monthly fee per Planner	571	571

* All pricing includes V.A.T @14% Year 1 (R 1,682.46) On-going (R 1,682.46)

Commencement date Year 1: _____

Commencement date On-going: _____

Signed at _____ on this _____ day of _____

Annexure prepared by: WPS Admin