



## ANNEXURE "D": CUSTOMISED BENEFIT STATEMENT DRAFT PROPOSAL

### standard proposal - Version: 1 - Draft

Prepared for:

**Name:** Anton CC  
**Contact Name:** Anton  
**Tel:**  
**Type:** Strategic Partner  
**Date:** 14 March 2016

Prepared by:

**Old Mutual Wealth Services Company (Pty) Ltd**  
**Reg No.** 2012/100073/07  
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## SERVICE DETAILS

### FINANCIAL PLANNING SERVICES

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

| Planner Name | Service Option                | Year 1        | On-going      |
|--------------|-------------------------------|---------------|---------------|
| Alida        | IWP Training Program (Medium) | 7,800         | 3,500         |
| Anton        | IWP Coaching Program (High)   | 14,000        | 7,500         |
| Esme         | IWP Coaching Program (High)   | 7,500         | 7,500         |
| <b>Total</b> |                               | <b>29,300</b> | <b>18,500</b> |

#### 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](http://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 Standard (Medium) | 6,000        | 4,000        |
| <b>Total</b>                 | <b>6,000</b> | <b>4,000</b> |

### Consulting Standard (Medium)

- Access to selected online courses and business tools via [www.knowmore.co.za](http://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 (10 hours in year 1, thereafter 5 hours per year).
- Option to purchase additional coaching hours (in bundles of 10) via [www.knowmore.co.za](http://www.knowmore.co.za).

## OLD MUTUAL WEALTH XPLAN MULTI-SITE (CRM-INTEGRATOR)

Services are delivered per practice

| Service Option        | Year 1        | On-going      |
|-----------------------|---------------|---------------|
| X Plan OMW Multi-site | 27,000.00     | 12,000.00     |
| <b>Total</b>          | <b>27,000</b> | <b>12,000</b> |

### X Plan OMW Multi-site

- Access to the Old Mutual Wealth Xplan CRMIntegrator application that is integrated with the Old Mutual Wealth Integrator financial planning tool (the fee excludes the Iress license fee).
- Co-ordination of data migration to our application, practice site set up and set up of integration functionality,
- Onsite, post-data migration training and embedding of Xplan in the practice.
- Implementation of practice management processes, communication plan implementation.
- Ongoing, telephonic support with regards to the CRMIntegrator.
- The ability to benefit from basic site customisation.
- The ability to benefit from additional customisation on the multi-site, based on a majority vote, on a fee sharing basis.
- Any customisation / configuration on a practice level of the multi-site can be facilitated on a time and materials basis, depending on resource availability.

### CRMIntegrator Support hours

- The Xplan Multi-Site is supported via the Business Integration Consulting Service.
- You will be assigned a dedicated Integration Consultant.
- The support hours are during normal working hours, from 08:30 to 17:00 during weekdays, excluding public holidays.
- The Xplan Multi-site is generally available 24x7, except during planned maintenance.

## ADDITIONAL LICENSES

| Name   | Business Assessment<br>(BAT) (R0 per License) | Client Survey (CSS) (R0<br>per License) |
|--------|-----------------------------------------------|-----------------------------------------|
| Esme   | Yes                                           | No                                      |
| Totals | 500                                           |                                         |

## FEE SUMMARY

**Prepared for**

**Name:** Anton CC  
**Contact Person:** Anton  
**Type:** Strategic Partner

| Service Details                                           | Fees Year 1   | Fees On-going |
|-----------------------------------------------------------|---------------|---------------|
| <b>Financial Planning Services</b>                        |               |               |
| Alida - IWP Training Program (Medium) - Year 1            | 7,800         | 3,500         |
| Anton - IWP Coaching Program (High) - Year 1              | 14,000        | 7,500         |
| Esme - IWP Coaching Program (High) - Maintenance          | 7,500         | 7,500         |
| <b>Business Management Services (BMS)</b>                 |               |               |
| Consulting Standard (Medium) - Year 1                     | 6,000         | 4,000         |
| <b>Old Mutual Wealth Xplan Multi-site (CRMIntegrator)</b> |               |               |
| X Plan OMW Multi-site - Year 1                            | 27,000        | 12,000        |
| <b>Additional Licenses</b>                                |               |               |
| Business Assessment (BAT) - Esme                          | 500           | -             |
| <b>Sub Total</b>                                          | <b>62,800</b> | <b>34,500</b> |
| <b>Less 10% (Strategic Partner Discount)</b>              | <b>-6,280</b> | <b>-3,450</b> |
| <b>Total</b>                                              | <b>56,520</b> | <b>31,050</b> |
| <b>Monthly Debit Order Amount</b>                         | <b>4,710</b>  | <b>2,588</b>  |
| <b>Average monthly fee per Planner</b>                    | <b>1,570</b>  | <b>863</b>    |

\* All pricing includes V.A.T @14% Year 1 (R 6,941.05) On-going (R 3,813.16)

Commencement date Year 1: \_\_\_\_\_

Commencement date On-going: \_\_\_\_\_

Signed by \_\_\_\_\_ at \_\_\_\_\_ on this \_\_\_\_\_ day of \_\_\_\_\_