

ANNEXURE "D": CUSTOMISED BENEFIT STATEMENT



vvv - Version: vv - Draft

Prepared for:

Partner Name: vvv
Contact Person: vvv
Tel:
Email:
Type: Partner
Date: 12 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
Esme	IWP Introduction Program (Low)	5,800	3,200
Irene	IWP Coaching Program (High)	14,000	7,500
Total		19,800	10,700

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 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 Standard (Medium)	6,000	4,000
Total	6,000	4,000

Consulting Standard (Medium)

- 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 (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.

Old Mutual Wealth Xplan Multi-site (CRMIntegrator)

Services are delivered per practice

Service Option	Year 1	On-going
N/A	0	0
Total	0	0

Annexure D: Partner Program Customized Benefit Statement

Prepared for:

Partner Name: vvvv
Contact Person: vvv
Type: Partner

Service Details	Fees Year 1	Fees On-going
Esme - IWP Introduction Program (Low) - Year 1	5,800	3,200
Irene - IWP Coaching Program (High) - Year 1	14,000	7,500
Business Management Services (BMS) - Consulting Standard (Medium) - Year 1	6,000	4,000
Old Mutual Wealth Xplan Multi-site (CRMIntegrator)	0	0
Total	25,800	14,700
Monthly Debit Order Amount	2,150	1,225
Average monthly fee per Planner	1,075	613

* All pricing includes V.A.T @14% Year 1(R 3,168) On-going (R 1,805)

Commencement date year 1: _____

Commencement date ongoing: _____

Signed at _____ on this _____ day of _____

Annexure prepared by: Andrew