

How to update your beneficiaries

through your Smart Benefit Statement, our website and WhatsApp



FundsAtWork Smart Benefit Statement

Step 1

Click [here](#) to log onto your Smart Benefit Statement.

Step 2

Select **My beneficiaries** from the menu or from the welcome screen.

Step 3

Add your beneficiaries for each benefit separately. You can also add notes and maintenance orders.



It's important to nominate beneficiaries for your retirement savings, your death benefits and your funeral benefits. **If you do not nominate a beneficiary, we will pay your unapproved death and funeral benefits into your estate,** and your family may not have access to them for some time.

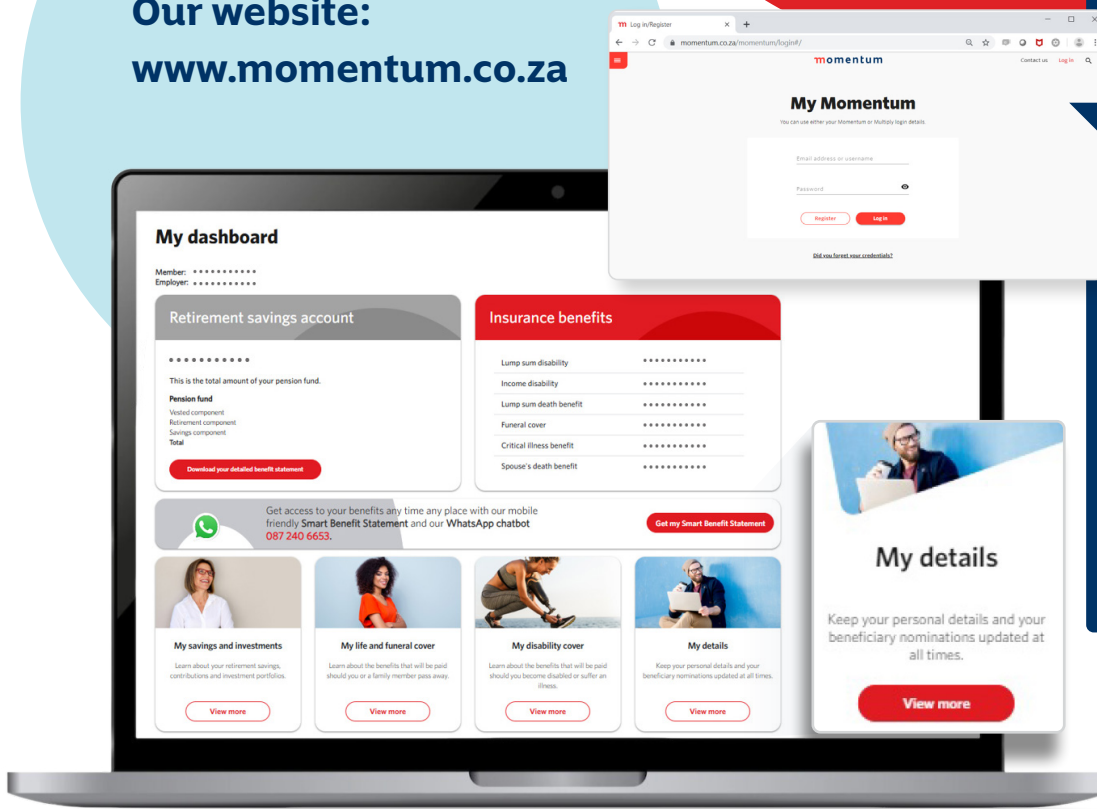
You need to add the names of your beneficiaries, their ID numbers or dates of birth and their contact details.

We will not inform your beneficiaries that they have been nominated unless a claim arises.

Our website:
www.momentum.co.za

Step 1

1. Go to **momentum.co.za** and click on Log in at the top right of the screen.
2. Under My Momentum, enter your username and the password that you selected when you created your online profile and then click **Log in**. You might be asked to verify your access.
3. Under Employee Benefits go to the FundsAtWork website.
4. Then under My details go to Beneficiaries and follow the instructions to view or update your beneficiary nominations.

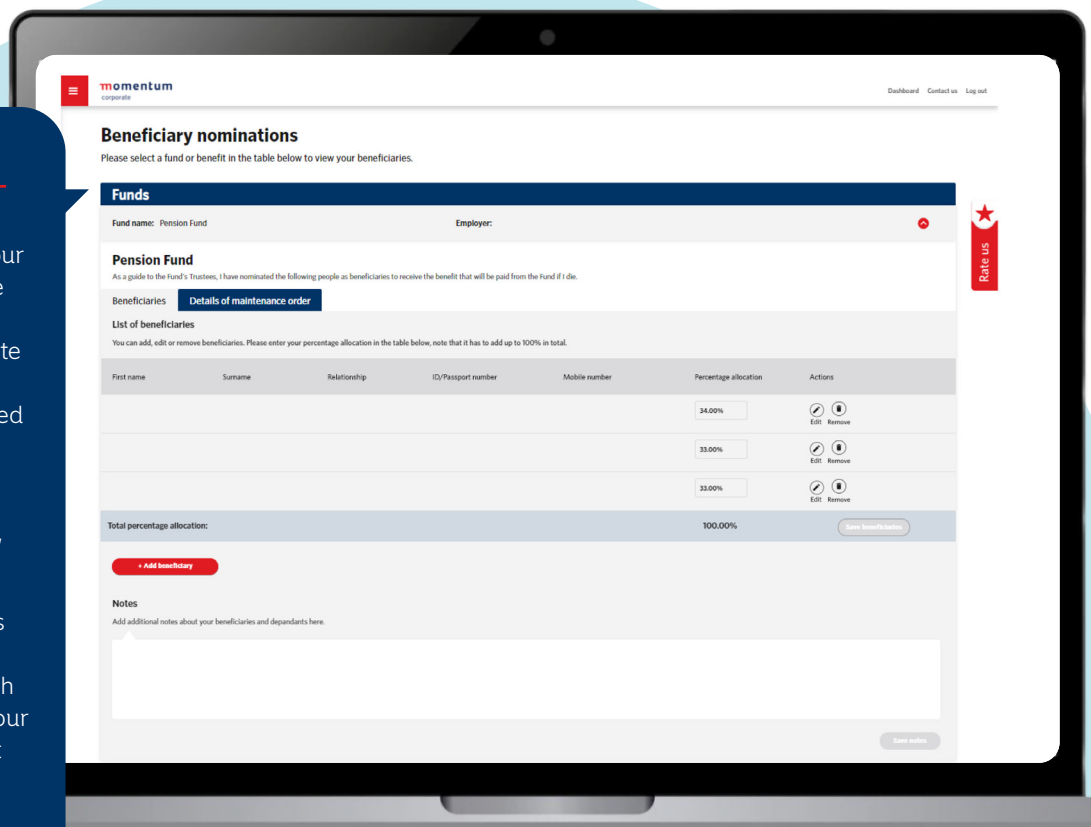


Step 2

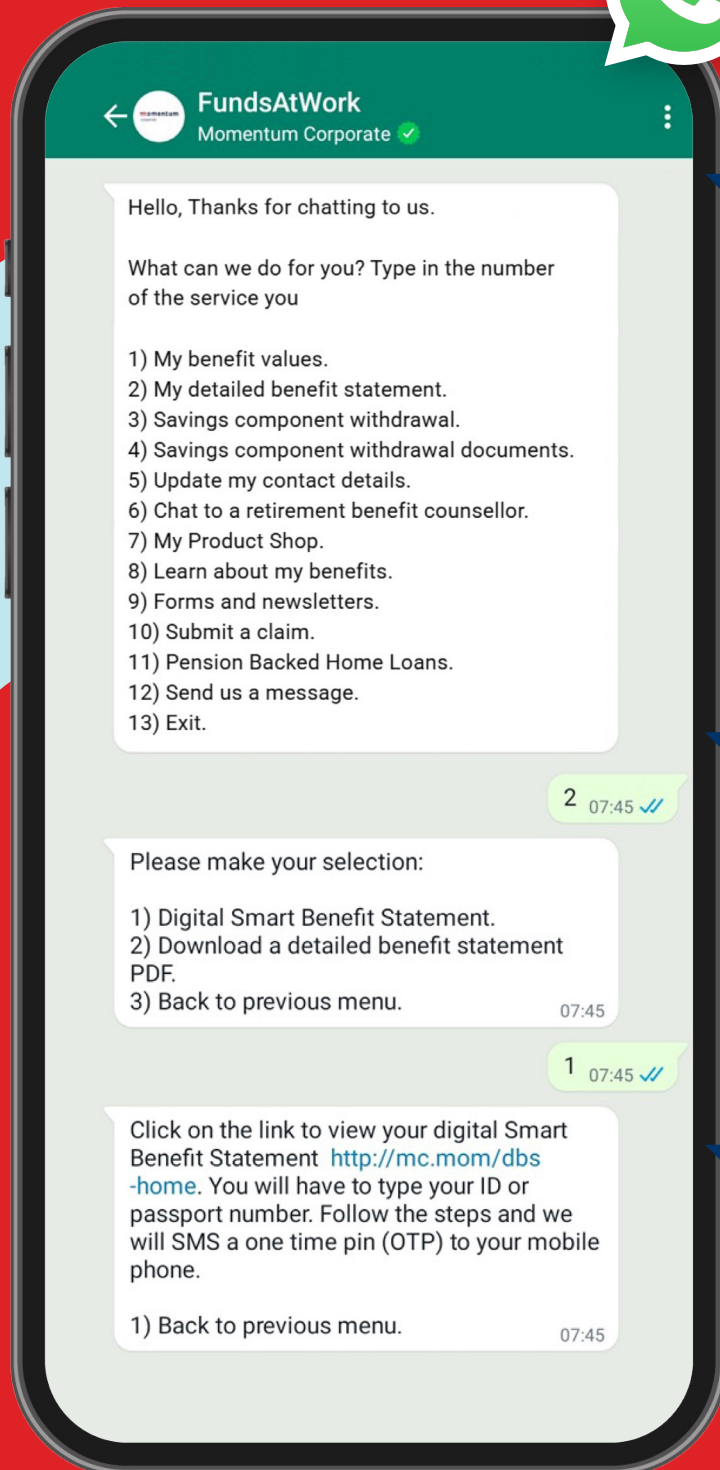
You will see your current beneficiaries for each of your benefits. Depending on the rules of your scheme, you may be required to nominate beneficiaries for your retirement savings, approved death benefit, unapproved death benefit and funeral benefit. You can also add notes and list details of any maintenance orders.

You need to add the names of your beneficiaries, their ID numbers or dates of birth and their contact details. Your beneficiary allocation must add up to 100%.

We will not inform your beneficiaries that they have been nominated unless a claim arises.



FundsAtWork WhatsApp chat



Step 1

Save our number

1. Save our WhatsApp number as one of your contacts: **087 240 6653**
2. WhatsApp us the word **"Hello"**
3. Follow the prompts to **verify your identity**

Step 2

Navigate to your Smart Benefit Statement

1. Choose option 2 **'My detailed benefit statement'**
2. Then select option 1 **'Digital Smart Benefit Statement'**

Step 3

Access your Smart Benefit Statement

1. Click on the link to go to your **Smart Benefit Statement**.
2. Follow the steps on page 1 of this guide.