

Momentum Corporate's objective

Member Solutions overview

Value Member Solutions provides

Client value proposition

**momentum**  
corporate

# Your journey to success

Information pack for Member Solutions



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# Committed to **every journey to success**

Every employer's and employee's journey to achieving their financial goals is what inspires Momentum Corporate to go beyond to helping them achieve their success. Choosing to walk your journey with us, is a choice for a partner with professional financial solutions and products that meet your needs.



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Member Solutions overview

Value Member Solutions provides

Client value proposition

# Member Solutions overview

Financial wellbeing is at the heart of any employee's journey to success, through our Member Solutions offering we educate and support members of retirement funds. Our dedicated division to member services enables Momentum Corporate to help employers create more meaningful employee experiences with expert counselling support.

Member Solutions empowers employees to understand their employee benefits and assists them in selecting the right financial options while employed to build a solid financial plan for their current and future life stages.

**Member Solutions  
is invested in every  
member, from start  
to finish, at every  
age and stage.**



Momentum Corporate's objective

Member Solutions overview

Value Member Solutions provides

Client value proposition

# Value Member Solutions provides

What it does for employees

Value

Value

Member Solutions ensures employee benefits are understood and meet the needs of members at each stage of life.



Momentum Corporate's objective

Member Solutions overview

Value Member Solutions provides

Client value proposition

# Value Member Solutions provides

What we offer for employers and their business

Value

Value





Momentum Corporate's objective

Member Solutions overview

Value Member Solutions provides

Client value proposition

Member Solutions

Core  
Benefits

Digitally  
Enabled

Employer

with  
FundsAtWork



Retirement  
Benefit  
Counsellors



Pension-backed  
home loans



Preservation  
benefit

Stand  
alone



Retirement Benefit  
Counsellors Lending  
services



Retirement Income  
Solutions Channel

Member choice: non voluntary



Retirement Benefit  
Counsellors

Member choice: voluntary



Pension-backed  
home loans



Preservation and paid-up  
savings



Annuities at retirement

Event-based production choice

Choice of digital engagements channels



Smart  
Solutions



Web  
Portals



Mobile claims & interaction:  
WhatsApp

Employer choice

Member choice

Voluntary choice



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Member Solutions overview

Value Member Solutions provides

Client value proposition

## Retirement benefit counselling

The choices your employees make today will shape their income for the rest of their lives. It's essential that they are informed and empowered to make the right decisions. Our retirement benefit counsellors help employees understand their retirement fund options when members join, exit, as well as during their fund membership that fit their unique needs.

Default  
Investment  
Portfolios

Preservation options

Annuity strategy

Member guidance

**Retirement Benefit Counselling**





Momentum Corporate's objective

Member Solutions overview

Value Member Solutions provides

Client value proposition

## Worksite financial consultants

Our worksite financial consultants provide employees with financial education and counselling, helping them make confident decisions about their money, benefits, and ensure that these members have access to appropriate financial advice. These consultants bridge the gap between financial products and real-life goals empowering individuals to make informed decisions.

Supported by a team  
of financial planners

Scheme adviser  
mandate

Generate referrals

Holistic member  
experience

Employee financial wellbeing





**Momentum Corporate's objective**

**Member Solutions overview**

**Value Member Solutions provides**

**Client value proposition**

## Pension-backed home loans

Through Momentum Lending, a registered credit provider, retirement fund members can get affordable, responsible access to a loan that funds home related needs.

It is a smart way for members to use a portion of their retirement savings as security to access funding, without withdrawing from their retirement fund. Unlike traditional home loans, this facility offers competitive interest rates - up to prime minus 1,00%.

**Pension-backed home loans**



Buying a house  
(or paying a  
deposit)

Renovating or  
extending their  
existing home

Installing alternative  
energy and water  
solutions

Buying land  
to build a  
home

Covering bond  
registration and  
transfer costs

Paying off an existing  
home loan on their  
primary residence

**Momentum Corporate's objective**

**Member Solutions overview**

**Value Member Solutions provides**

**Client value proposition**



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Corporate Specialist and  
register your business with  
Member Solutions.**

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**Momentum Corporate**

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