

# 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.



# 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.





**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.



**Value Member Solutions provides** 

**Client value proposition** 

### **Value Member Solutions provides**

What we offer for employers and their business



**Momentum Corporate's objective** 

**Member Solutions overview** 

**Value Member Solutions provides** 

**Employer** 

**Client value proposition** 

Core Benefits

Digitally Enabled



Counsellors



Stand alone



**Retirement Benefit Counsellors Lending** services



**Retirement Income Solutions Channel** 

#### **Member choice: non voluntary**



**Member choice: voluntary** 



**Pension-backed** home loans



Preservation and paid-up savings

**Event-based production choice** 



**Annuities at retirement** 

#### **Choice of digital engagements channels**





Web

**Portals** 

Mobile claims & interaction: WhatsApp

**Employer choice** 

**Member choice** 

**Voluntary choice** 

**Member Solutions** 

#### **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** 





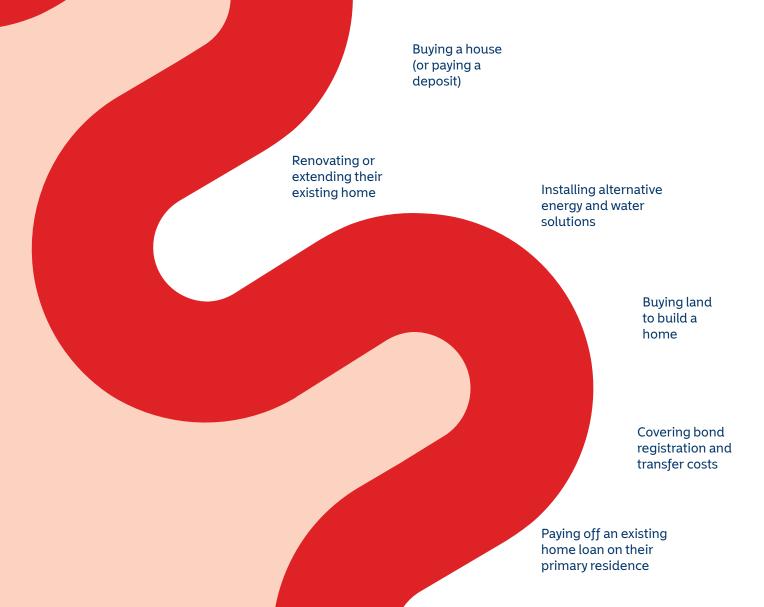
**Momentum Corporate's objective Member Solutions overview Value Member Solutions provides Client value proposition Worksite financial consultants** Our worksite financial consultants provide employees with financial education and counselling, helping them make confident decisions about their money, 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 Scheme adviser Generate referrals Holistic member experience of financial planners mandate **Employee financial wellbeing** 

#### **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** 







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