

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



Momentum Corporate's objective

Member Solutions overview

Value Member Solutions provides

Client value proposition

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 above and 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.



Momentum Corporate's objective

Member Solutions overview

Value Member Solutions provides

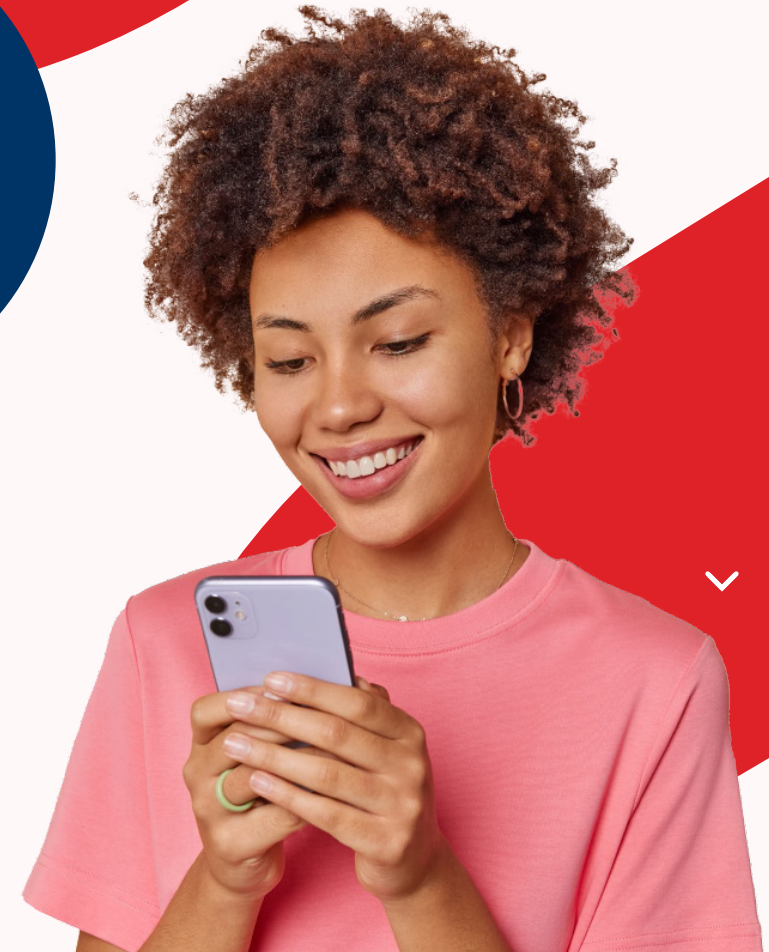
Client value proposition

Member Solutions overview

Financial wellbeing is at the heart of any employee's journey to success. Through our Member Solutions offering, we educate and empower members of retirement funds with tailored solutions. Our dedicated member services division enables Momentum Corporate to assist employers in creating more meaningful employee experiences through expert counselling support, client-centric products, and relationship management capabilities.

Member Solutions empowers employees to understand their employee benefits and assists them in selecting the right financial options while they are employed, ultimately enhancing their financial wellness for both their current and future life stages. In doing so, we not only help them secure their financial future but also enable them to realise their dreams along the way.

**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

Our value as Member Solutions

What we offer 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

The difference Member Solutions makes

What we offer 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

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

Choice of digital engagements channels



Smart
Solutions



Web
Portals



Mobile claims & interaction:
WhatsApp



Default solutions
for preservation



Annuities at retirement

Event-based production choice

Employer choice

Member choice

Voluntary choice



Momentum Corporate's objective

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

Strategic partnerships

Collaborating with strategic partners to develop customised annuity solutions that prioritise the needs of employees. Together we design and deliver a seamless annuity strategy that supports long-term financial security and peace of mind for your workforce.

Strategic partnerships

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



**Speak with a Momentum
Corporate Specialist and
register your business with
Member Solutions.**

MemberSolutions@momentum.co.za

momentum.co.za



Momentum Corporate

Disclaimer

Copyright reserved © Momentum Metropolitan 2025 - Momentum Corporate is a part of Momentum Metropolitan Life Limited (registration number 1904/002186/06), a wholly owned subsidiary of Momentum Group Limited. The document is for illustrative purposes only and does not constitute tax, legal, accounting, or financial advice. You rely on the contents at your sole discretion. We recommend that you consult with a financial adviser before making any changes to your group employee benefits. Momentum Group Limited, its subsidiaries, including Momentum Metropolitan Life Limited, will not be liable for any loss, damage (whether direct or consequential) or expenses of any nature which may be incurred because of, or which may be caused, directly or indirectly, to the use or reliance on this publication. Terms and conditions apply.

11/2025

Momentum Metropolitan Life Limited is a licensed life insurer, authorised financial services (FSP6406) and registered credit provider (NCRCP173), and rated B-BBEE Level 1.