

Momentum Corporate's objective

Momentum Consultants and Actuaries

Value and key advantages

Client value proposition



momentum
consultants & actuaries

Your journey to success

Information pack for Momentum
Consultants and Actuaries



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Empowering your business with our employee benefits solutions

Every employer's and employee's journey to achieving their financial goals is what inspires Momentum Corporate to go above and beyond in helping them achieve their success. Choosing to walk their journey with us is choosing a partner with comprehensive and trusted employee benefits solutions that meet their needs.



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We start with
you and build
for you.

Momentum Consultants and Actuaries

As a trusted partner, we work closely with our clients to help them achieve and deliver on their objectives. Our team of highly skilled professionals including actuaries, CFA and CFP charter holders, chartered accountants, and lawyers, backed by efficient support employees, leverage smart technology, data-driven insights, and meaningful engagement to guide and provide tailored consulting services. Our approach begins by understanding each client's goals and challenges. We then apply this understanding to collectively build strategies and solutions that make a measurable difference.

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We advise on a wide range of products and solutions in the market, not only those provided by Momentum. We ensure that clients receive the best advice and solutions for their specific requirements.”



Build deep connections with employers and their employees



Use data and insights to understand the needs of the client's workforce



Asset consulting



Employee benefits consulting



Healthcare consulting



Actuarial services



SmartAdvice solutions make management effortless



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- Create a dynamic roadmap to financial success for our clients by understanding their pressures, goals, and needs. One that evolves as these change.
- Keep advice simple and actionable. We avoid complexity to save time and deliver value, because our clients can't afford to guess when people's lives are at stake.
- Offer flexible solutions and tools that evolve with the changing employee benefits landscape.

**What it does for
employees**



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**What it does
for employers**



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Advisory services



Employee benefits
consulting



Healthcare
consulting



Asset
consulting



Actuarial
consulting



Member advisory
services



Legal and technical
consulting

SmartAdvice solution:



SmartInsights



Employee benefits consulting

Our employee benefits consultants provide tailored benefit structures for diverse employee needs. They do this by sourcing from the market unbiased and cost-effective solutions. They use data analytics to understand employee behaviour and recommend impactful interventions.

Healthcare consulting

Our healthcare consultants help businesses build healthier, more productive workforces through strategic, data-informed guidance. We develop tailored healthcare strategies, manage benefit utilisation, and support employers with market reviews, committee facilitation, and direct employee consultations to ensure optimal value and wellbeing outcomes.

Asset consulting

Our asset consulting service helps businesses navigate market volatility with confidence. We provide independent, outcome-driven investment advice focused on employers' and employees' needs, supported by independent performance reporting for full transparency.

Actuarial consulting

Our actuarial consulting team partners with businesses to deliver precise, data-driven insights that strengthen financial decision-making and long-term stability. We provide specialised solutions across liability management, post-retirement medical funding, defined benefit and pre-funding strategies, as well as pensioner outsourcing—helping clients manage risk and meet their obligations with confidence.





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Member advisory services

Our member advisory service keeps employees actively engaged in their financial journey, even when market conditions are challenging. Through personalised guidance, workshops, coaching, and retirement benefit counselling, we help members make informed decisions, stay motivated, and remain on track to achieve their long-term financial goals.

SmartAdvice solution

Turn insights into action with our SmartAdvice solutions. Using data to deeply understand each employee's needs and risk profile, so we can deliver personalised financial guidance that drives better decisions and lasting outcomes.

SmartInsights

If funds knew exactly how their members were progressing toward their retirement goals, how would they use that insight? SmartInsights provides clear, data-driven intelligence into member behaviour and engagement. This digital solution helps track progress, identify trends, and make informed decisions that support better outcomes for employees or members.



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**Get in touch
with Momentum
Consultants and Actuaries
and build solutions that truly
understand clients
and their employees.**

momentum.co.za

 **Momentum Corporate**

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