
momentum
corporate
momentum Grow

Digital, convenient, innovative, environmentally friendly

We believe in the power of partnering with you, the financial adviser, to provide you and your clients with the best employee benefits solutions.

You shared with us your thoughts on how employee benefits can be disrupted, and we listened. We were not surprised that most of the responses emphasised how digital technology can be used to improve and streamline processes and service delivery. This was just the proof needed to confirm that we are on the right track with our digital journey.

As an industry, we all know that any employer offering employee benefits to their employees is not just the right thing to do, but also makes business sense as they can attract and retain talented people.

If you and your clients want a digital, simple, convenient, innovative, flexible, personalised, and environmentally friendly employee benefits solution, we have you covered.

Introducing momentum Grow

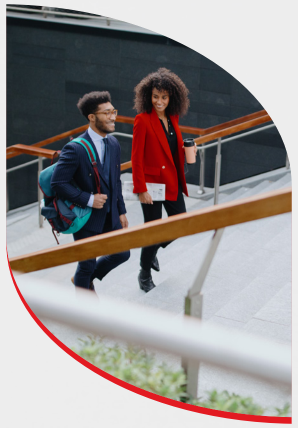
With Momentum Grow, employees have the freedom to be curious, to play and learn, and the confidence to grow their financial success. Momentum Grow makes financial solutions and education fun and accessible to the broader employed South African population. By connecting with each individual and their broader community, we will make your clients and their employees fall in love with employee benefits.

Momentum Grow is available to new Momentum Corporate clients. Employers who take up the retirement benefits must have at least 10 employees, or a minimum annual premium income of R200 000. Employers who take insurance benefits only must have at least 15 employees. The maximum number of employees is 100.

The **Solution**

Momentum Grow has two building blocks, which your clients can mix and match for their employees. They can choose to provide retirement benefits, insurance benefits or a combination of the two.

The retirement benefits are offered through our award-winning FundsAtWork Umbrella Pension and Provident Funds.



- Simple retirement features and contribution flexibility.
- Several investment portfolios linked to members' various investment needs, and they can switch between them.
- Members can move to the Momentum Corporate Preservation Funds or become a paid-up member in FundsAtWork when they leave their employer. They also have access to our range of annuities when they retire.

- We empower you with our new Smart Quotes where you can get quotes using your smartphone or laptop.
- We make the employer's life easier with our admin-light employer portal experience.
- Full self-service client journey for members, that incorporates a multi-channel experience, with smooth transition from digital to human engagement with our retirement benefit counsellors' live chat capability.

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Your clients can choose from a range of benefits to meet their employees' insurance needs. If they bundle the retirement and insurance benefits, their employees have the flexibility to choose the amount of life, disability and funeral cover that meets their personal needs.

The insurance benefits are:

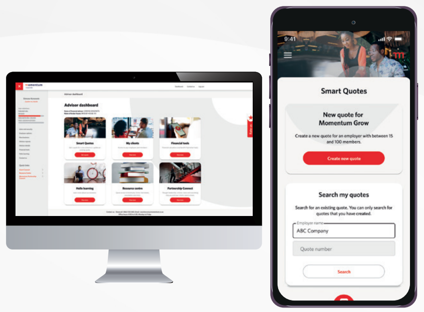
- Lump sum death benefit
- Income and lump sum disability
- Critical illness benefit
- Funeral benefit for insurance schemes
- Funeral and education benefit through Family Protector for retirement schemes

In support of the environment, on the Grow Green benefit we partner with the Greenpop Foundation to plant a tree to remember every member passing away during each year.

What you can expect from our **digital service model**

Momentum Grow leverages the digital toolkit that is available to FundsAtWork. Our digital service model is designed to support you, your clients, and their employees through a multi-channel experience, with smooth handover from digital to a human when it's needed.

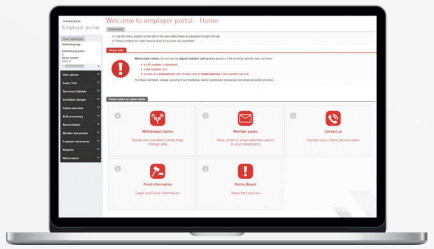
For financial advisers



Our new self-service **Smart Quotes** solution gives you the edge. You can decide on the structure of your client's scheme at a time that is convenient for them, on your smartphone, tablet, or desktop computer. The Smart Quotes portal is available through the VIA platform.

You have access to the **adviser portal,** which provides you with all the tools and information you need to support your clients.

For employers



The **employer portal** offers your clients a suite of self-service capabilities that supports their administration processes. It removes the complexity of day-to-day administration and gives them the tools they need to manage their employees' data and monthly contribution payments smoothly and effortlessly.

For employees

Four core engagement channels offer members choices, from **web** and **app** users to those who prefer a data-light **WhatsApp** experience, all supported by our retirement benefit counsellors' live chat feature. Our self-service experience empowers members to explore and learn and take control of their finances. They can get statements, reports, and educational content. They can also manage their personal and contact details and beneficiary nominations, switch portfolios and flex their insurance benefits digitally in a secure environment.

Our digital channels are supported by our **Smart Solutions** that **support** members at key life events when they need access to the right information and benefit counselling to help them make the best financial choices. These include Smart Onboarding, the Smart Benefit Statement, Smart Underwriting and Smart Move. Smart Retirements and our Smart Annuity portal lets them continue their digital journey as they transition into retirement.

Talk to a Momentum Corporate Specialist about Momentum Grow and how it can assist your clients and their employees. You can also go to the VIA platform and see for yourself how easy it is to do a quote.

#YourSuccessIsOurBusiness

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