

Momentum Grow

Committed
to every **journey**
to **success**





Every business' journey is unique.

1

How does Momentum Corporate collaborate with businesses?

Each of your employees is at different stages in their unique life journey. The need of your business is different to another. We partner with the employer and their appointed financial adviser. Together, we create and deliver employee benefits solutions that talk to the heart of your business and your people.

2

How does Momentum Grow fit in with Momentum Corporate?

The retirement benefits are offered through our award-winning FundsAtWork Umbrella Pension and Provident Funds. Momentum Corporate offers Momentum Grow to new clients with up to 200 members and they can choose retirement, insurance and healthcare benefits.

3

What is FundsAtWork?

The FundsAtWork Umbrella Fund helps members reach their retirement goals, protects them against the financial impact of unexpected life events, and offers them value-added services.

4

What are the criteria to become a Momentum Grow client?

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 200.



5

What are the options the employer and their employees have for the retirement benefits under Momentum Grow?

Simple retirement features and contribution flexibility.

Employers choose the investment portfolios upfront from the range offered and then members can switch between them based on their individual investment needs.

7

What healthcare benefits do employees have access to?

Momentum Health4Me offers affordable, flexible health insurance designed to give employees access to quality healthcare. It provides essential day-to-day and hospital benefits through a trusted network of healthcare providers, helping businesses promote employee wellbeing while managing costs effectively. With a choice of cover options, Health4Me ensures that every employee – regardless of income level – can access the care they need to stay healthy and productive.

6


What insurance products are offered under Momentum Grow?

Lump sum death benefit, Income and lump sum disability benefit, critical illness benefit, funeral benefit for insurance schemes, funeral and education benefit through Family Protector for retirement schemes.

8

What multi-channel experience can employees experience?

Employees enjoy a simple, self-service digital experience across the website, the Momentum app, and WhatsApp – giving them easy access to statements, benefit details, educational content, and a live chat support with retirement benefit counsellors. Smart digital tools guide them through key life events, helping them make confident financial decisions from onboarding to supporting them through the retirement benefit counsellors when they need to speak to a human.



9

What value-add services are available?

- **Dragonfly** is a digitally led, next-gen platform changing how members and employers can effortlessly access, purchase, and alter their benefits. Our team innovates on traditional employee benefits, by combining them with behavioural interventions that empower individual choice and allow access to voluntary products.
- **TaxTim** simplifies tax season with a friendly, step-by-step digital assistant that helps members complete their return with confidence. The system integrates directly with SARS eFiling, so they can submit their tax return directly to SARS. They get one tax return for free every year and a second at a discounted rate.
- **Hello Doctor** – Members get expert medical advice 24/7 from a qualified doctor, anytime, anywhere in South Africa. Whether it's a sudden concern or a quick question, they can talk to a doctor on their phone within an hour.
- **Employee Assistance Programme** ensures members get 24/7 access to confidential counselling, legal guidance, debt advice, and wellbeing support for them and their family, whenever they need it
- **Funeral assistance service** provides support in managing funeral logistics. In those moments of grief, it helps to have someone who knows what to do. From coordinating the funeral plans, arranging transport, to providing emotional support, our team is by the member's side with compassionate, practical help when they need it most.
- **Studymaster** allows members to help their children thrive, from their first day of school to final exams. Members can give their children access to thousands of high-quality academic resources, including summaries, practice tests, and project assistance. The service is for up to two of their children in grades 1 to 12 and continues even if the member passes away.

**Speak with a
Momentum Corporate
Specialist and request a
quote for your business
for Momentum Grow.**