momentum
corporate



Financial decisions throughout your career

Beyond payday, you make important financial decisions throughout your career. From joining the fund and changing jobs to considering preservation and preparing for retirement, these critical moments can shape your long-term financial outcomes as they journey towards retirement.

Our qualified financial coaches provide retirement benefit counselling with personalised support to help you navigate these decisions. Through one-on-one engagement, they help you understand your benefits, consider your options, and make informed choices with clarity and confidence as your circumstances change.

Here's what you can look forward to when you reach out

Our financial coaches have a proven track record of delivering exceptional service and care. They engage directly with you to provide guidance tailored to your unique circumstances and needs. This includes:

- **Member guidance and counselling** on benefits
- **Proactive outbound engagement** with members approaching retirement
- **Default annuity retirement packs** including personalised projections of potential retirement income
- **Digital communication channels** such as WhatsApp, to deliver fast effective communication

Smart Solutions
to support the journey

- **Smart Move:** help you make informed financial decisions when you resign. The tool helps make informed decisions around your benefits in critical moment and encourages you to preserve your retirement savings and reduce administrative burden when you exit the fund.
- **Member engagement and education:** complement our one-on-one retirement benefit counselling, with interactive workshops and webinars that equip you with the knowledge and tools for financial success. These sessions provide practical education and address real-life financial challenges enabling confident financial decisions around your retirement benefits.

How to access the free guidance with our financial coaches

You can connect through:

Email:
membersolutions@momentum.co.za

The service is available from Monday - Friday, 08:30 to 16:30

RBCs are not financial advisers and therefore will not give you financial advice. They also do not earn any commission for the guidance or information they give you. If you use the services of a financial adviser, you may be charged for his or her services.

momentum.co.za Momentum Corporate

Disclaimer

Copyright reserved © Momentum Metropolitan 2026 - 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.

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