momentum
corporate

Empowering smarter benefit decisions



Educating and informing employees on their retirement fund benefits, to make better informed choices.

Our service is designed to positively influence the financial behaviour and choices of your employees to help them maximise the value of their benefits and make confident, informed decisions at every stage of their careers. Employees make important financial decisions throughout their careers. From joining the fund and changing jobs to making informed decisions regarding their retirement benefits, these critical moments can shape their long-term financial outcomes as they journey towards retirement.

As an employer on the FundsAtWork Umbrella Funds, your employees have access to our qualified financial coaches who provide retirement benefit counselling (RBC).

Through personalised one-on-one engagement, they help employees understand their benefits, consider their options, and choose the most suitable way forward as their circumstances change.

Meaningful employee impact

By investing in your employees' financial wellbeing, you:

- **Improve** overall employee outcomes.
- **Encourage** better financial behaviours.
- **Enhance** your reputation as a caring and responsible employer.

Together, we deliver meaningful impact with personalised support, practical guidance, and smart solutions to help your employees achieve financial confidence and security. Through personalised guidance, education and support, employees are empowered to make informed financial decisions, build financial resilience, and protect and achieve their long-term financial goals and dreams.

How to access retirement benefit counselling

Your employees can connect with qualified counsellors through:

Email:
membersolutions@momentum.co.za

WhatsApp:
087 240 6653

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

Practical support that makes a difference

With a proven track record of delivering exceptional service and care, our financial coaches provide relevant, tailored guidance that meets employees where they are. This includes:

- **Member guidance and counselling** on employee benefits.
- **Proactive member outreach** for members approaching retirement.
- **Default annuity retirement packs,** including personalised projections of potential retirement income.
- **Collaboration with HR** to guide exiting members on available options to ensure well informed decisions regarding their accumulated retirement savings.
- **Multi-channel engagement** with platforms like WhatsApp, enabling fast, accessible communication.

Supporting smarter financial decisions - at every stage

Smart Solutions
to simplify decisions

Retirement benefit counselling is backed by our mobile-friendly digital tools, designed to make the process simpler and smarter.

- Smart Move: helps employees make informed financial decisions when they resign.
  - Make informed financial decisions.
  - Preserve their retirement savings.
  - Minimise unnecessary tax implications.

It also reduces the administrative burden on employers during employee exits.

- Member engagement and education: to complement one-on-one retirement benefit counselling, we host interactive workshops.
  - Equip employees with practical financial knowledge.
  - Address real-life financial challenges.
  - Build confidence in decision-making.
- Employees gain the tools and understanding they need to take control of their financial decisions.

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