momentum
corporate

Tailored employee **benefits** built through **partnership**

We partner with funds, employers, retirement benefit counsellors and advisers to create customised employee benefits solutions and engagement strategies that support members to secure their long-term financial wellbeing.

Why this matters

The default regulations require that the trustees of retirement funds must establish an annuity strategy for members retiring. We partner with trustees to create customised annuity solutions for their funds. **These solutions can be**:

- Ringfenced for accredited financial advisers approved by trustees.
- Supported by our qualified financial coaches also referred to as retirement benefit counsellors.
- Delivered through Momentum's national adviser footprint.
- Tailored to specific Fund requirements.

Solution overview

We design customised with-profit and living annuity solutions aligned to each fund's annuity strategy. **These include**:

- Customised investment portfolios backing the annuity solutions.
- Input from trustees and key fund stakeholders.
- Institutional pricing structures.
- Accredited financial adviser distribution models.
- National financial adviser support.

This approach helps ensure employees receive consistent information and appropriate guidance when transitioning into retirement.

Why us?

Our solution is differentiated in the market because of the level of annuity customisation that we offer our strategic partners when it comes to:

- Customised investment portfolios.
- Customised access to the solution for selective financial advisers.
- Pricing based on institutional investment building blocks.
- Unique value proposition for retirement benefit counsellors and financial advisers.
- Value for money for members because of the Institutional pricing of the annuity solutions.

To explore a customised annuity strategy for your fund, speak to your Momentum Consultant to arrange a discussion and unpack your specific requirements.

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