How to update my Investo contribution details on the Momentum website

Before you start

- For now, you can only update contribution details if you own the investment and you are a natural person. The contribution payer (if it isn't you) must also be a natural person.
- Check that your cell phone number and email address, (and that of the contribution payer) are up to date, we're sending you verification requests.

What you can't do

- Change the contribution payer on the contract.
- Make the change if you are not yet 18.
- Make the change If you are a business or a trust.
- Make the change If your payment method is a stop order.
- Change your payment frequency (eg from yearly to monthly).

If you want to make any of these changes, please email investo@momentum.co.za or call 0860 664 321.

Log in to momentum.co.za (or register first).

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Click on the **Investments and Savings** tab and scroll to your products. Click on the Investo product you would like to view.

Show me

Scroll down to **Update your details** and click on **Contribution details**. We will send you a one-time PIN (OTP) to verify you.

Show me

The **Contribution details** screen will display, and you can see the existing information. Click on **Edit debit order**.

Show me

You can update the following details:

1. Deduction day*.
2. Debit order grouping.
3. Bank name.
4. Bank account number**.
5. Account type.
6. Branch name (if not universal).
7. Branch code (if not universal).

Click on **Save changes**.

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You can group debit orders for all your Investo, Myriad and Traditional contracts together, to be collected as one amount.
You can't change the bank details for Myriad or Traditional policies here.

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*If you change the deduction day to before the current date and current deduction date, we will collect a contribution immediately. This is to make sure that you don't miss the contribution for the current month.

**Remove any zeros that aren't usually part of your account number; type it as the bank shows it.

We send you (and the contribution payer, if different) an **MSign** request, so that you can read the terms of the change and sign for it.

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You have 72 hours to approve and sign the document. As soon as that's done, we update the records as you have requested. You can track the progress from **Contribution details** or cancel the process if you have to. We'll send you an email and SMS to confirm.

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If you capture new bank account details, we validate them. If the validation fails, you must please upload proof of banking details. Click on **Upload**, then on **Add file**. You can drag and drop the document or browse and choose it. Click on **Upload**, and we'll confirm that we've received it.

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You can update your other Investo contracts. Choose the contracts you want to change, and click on **Update**.

Show me