momentum
Traditional

Two-pot withdrawal value on WhatsApp

How to view your two-pot savings withdrawal value on WhatsApp

This document explains our WhatsApp process for viewing the amounts in the retirement savings component of your policies that are included in the two-pot retirement system.
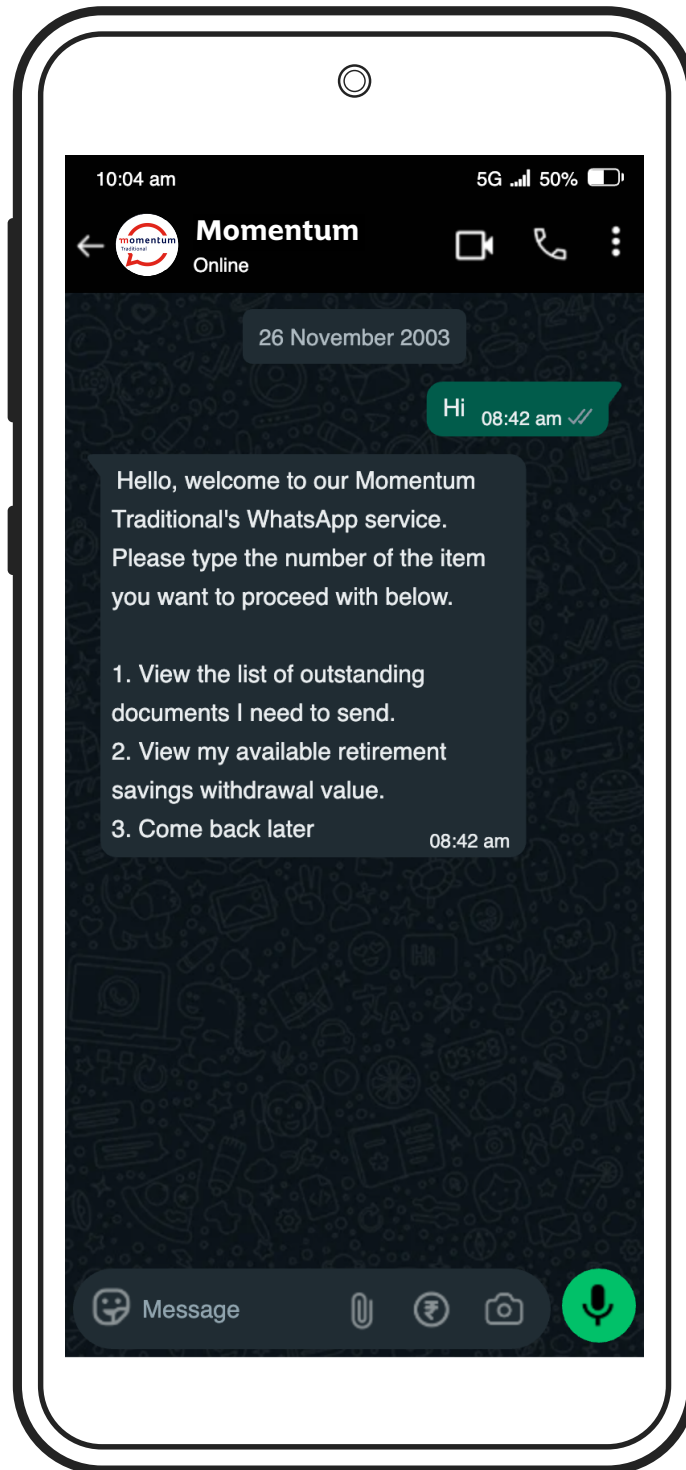
Important things to note :

1. Our security processes ensure your personal details are safe and secure in the chat.
2. Save Momentum Traditional as a contact on your phone before you use WhatsApp services. You only need to do this once.
3. Use the cell phone number we have on record to ensure we can provide you with the information your request.
4. Follow the prompts and enter the information or item number to get the help you need.
5. Currently on WhatsApp you can only view your retirement savings withdrawal value and receive a form to apply for a two-pot withdrawal.
6. You will only be able to view your two-pot withdrawal amount if your retirement policy is eligible for withdrawals.
7. The values displayed are only estimates and may also be subject to tax and fees.
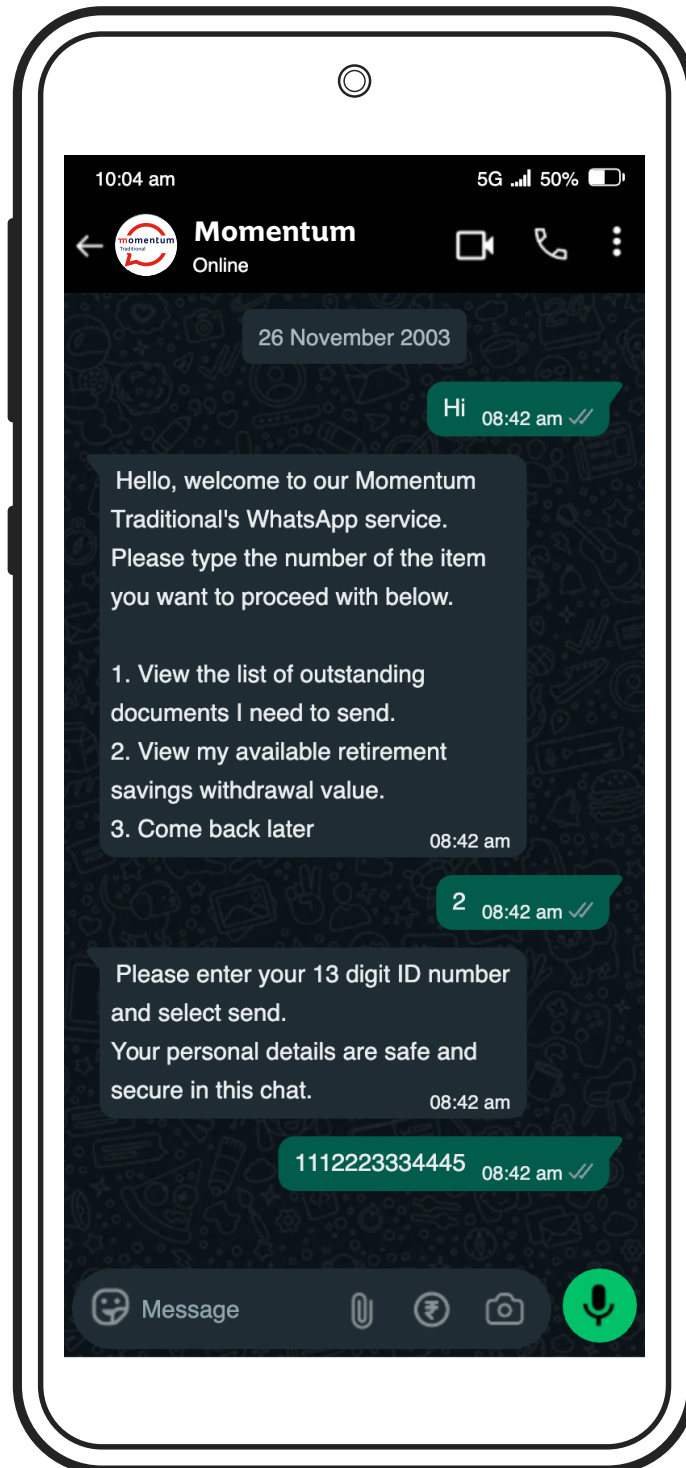
Step 1:

WhatsApp **"Hi"** to **068 707 3271** (Momentum Traditional).
We'll reply with the menu of available service options:

1. View the list of outstanding documents I need to send.
2. View my available retirement savings withdrawal valiue.
3. Come back later.

How to view your two-pot savings withdrawal value on WhatsApp

Step 2:

Type "2" to select the menu item "View my available retirement savings withdrawal value". We will ask you to enter your 13-digit ID number.

10:04 am   5G 📶 50% 🔋

Momentum
Online

26 November 2003

Hi   08:42 am ✓✓

Hello, welcome to our Momentum Traditional's WhatsApp service. Please type the number of the item you want to proceed with below.

1. View the list of outstanding documents I need to send.
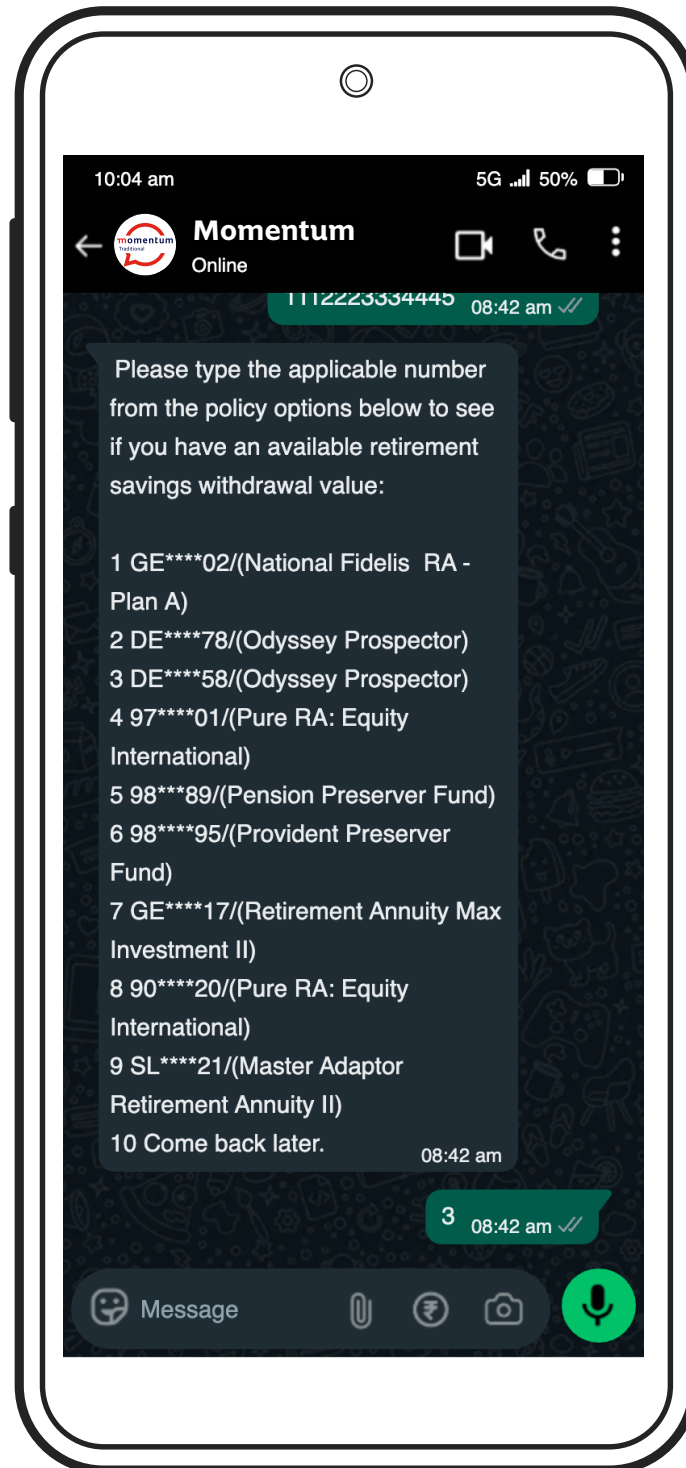2. View my available retirement savings withdrawal value.
3. Come back later

08:42 am

2   08:42 am ✓✓

Please enter your 13 digit ID number and select send.
Your personal details are safe and secure in this chat.

08:42 am

1112223334445   08:42 am ✓✓

Message

Step 3:

Enter your 13-digit ID number.
When your ID number has been successfully authenticated, we'll reply with a list of your eligible policies, each with a protected policy number.
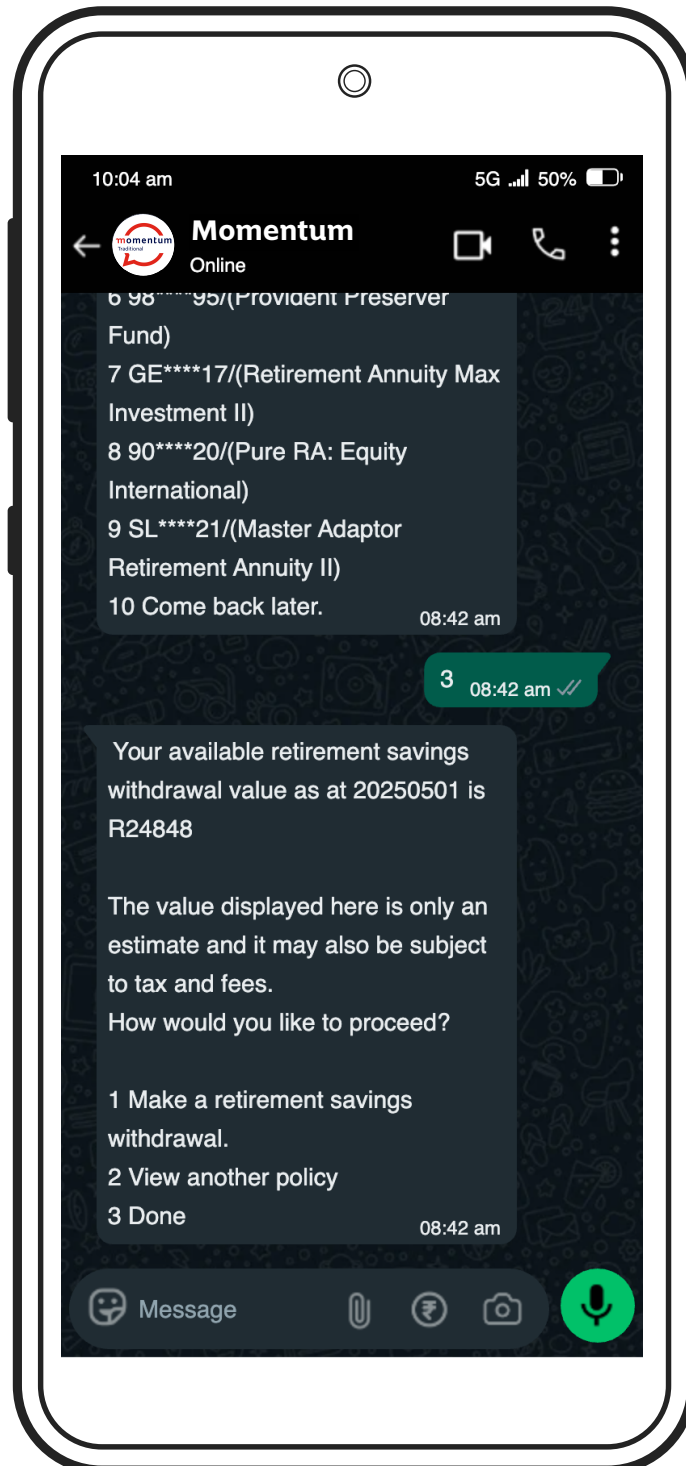
10:04 am   5G .ull 50% 🔋

← 🔴 **Momentum**
     Online   📹 📞 ⋮

1112223334445   08:42 am ✓✓

Please type the applicable number from the policy options below to see if you have an available retirement savings withdrawal value:

1 GE****02/(National Fidelis RA - Plan A)
2 DE****78/(Odyssey Prospector)
3 DE****58/(Odyssey Prospector)
4 97****01/(Pure RA: Equity International)
5 98***89/(Pension Preserver Fund)
6 98****95/(Provident Preserver Fund)
7 GE****17/(Retirement Annuity Max Investment II)
8 90****20/(Pure RA: Equity International)
9 SL****21/(Master Adaptor Retirement Annuity II)
10 Come back later.   08:42 am

3 08:42 am ✓✓

🙂 Message   📎 ₹ 📷 🎤

Type the item number of the policy you'd like to see the available withdrawal value for.
We'll reply with an estimated value of the retirement savings you have available in your savings component.
The reply will also include more menu options to choose from if you want to:

· Make a retirement savings withdrawal.
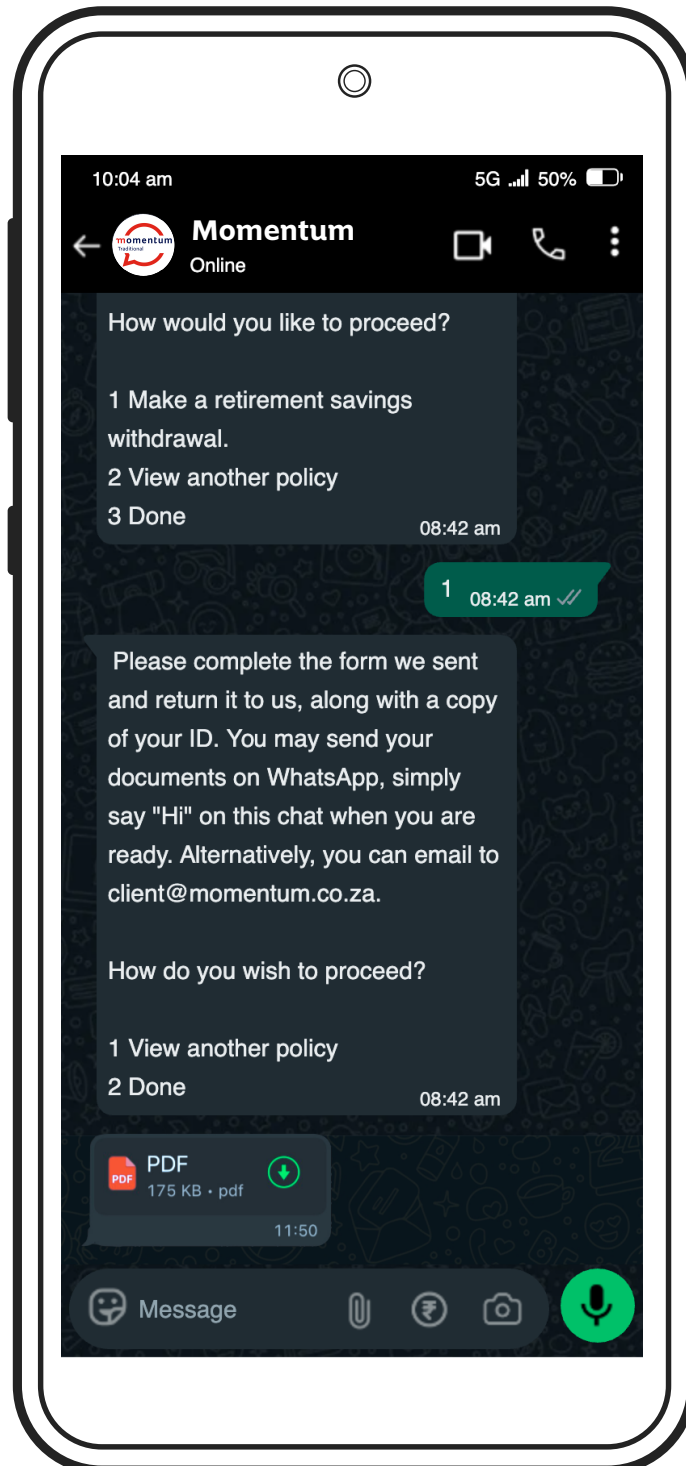· View another policy.
· Complete your request.

Inside the phone screen:

10:04 am   5G 50%

Momentum
Online

6 98****95/(Provident Preserver Fund)
7 GE****17/(Retirement Annuity Max Investment II)
8 90****20/(Pure RA: Equity International)
9 SL****21/(Master Adaptor Retirement Annuity II)
10 Come back later.
08:42 am

3   08:42 am ✓✓

Your available retirement savings withdrawal value as at 20250501 is R24848

The value displayed here is only an estimate and it may also be subject to tax and fees.
How would you like to proceed?

1 Make a retirement savings withdrawal.
2 View another policy
3 Done
08:42 am

Message

Step 5:

To make a retirement savings withdrawal on the policy you've viewed, type "1" to select the menu item "Make a retirement savings withdrawal".
We'll reply with an application form to complete and return to us together with a copy of your ID.
The reply will also include more menu options to choose from if you want to:
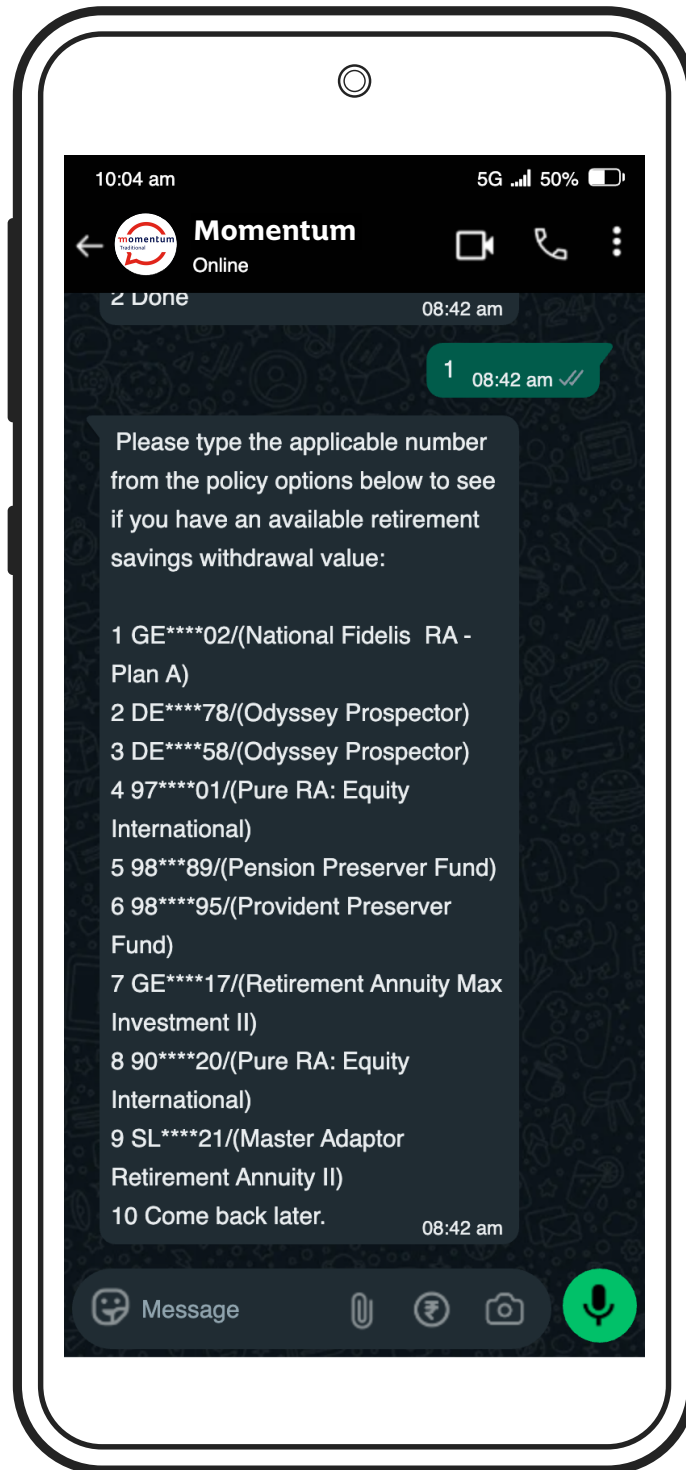- View another policy
- Complete your request

Step 6:

To see if you have an available two-pot withdrawal amount on another policy, type "1" to select the menu item "View another policy".
We'll reply with list of your policies included in the two-pot retirement system, each with a protected policy number.
You can select the item number of another policy, like you did in step 4.
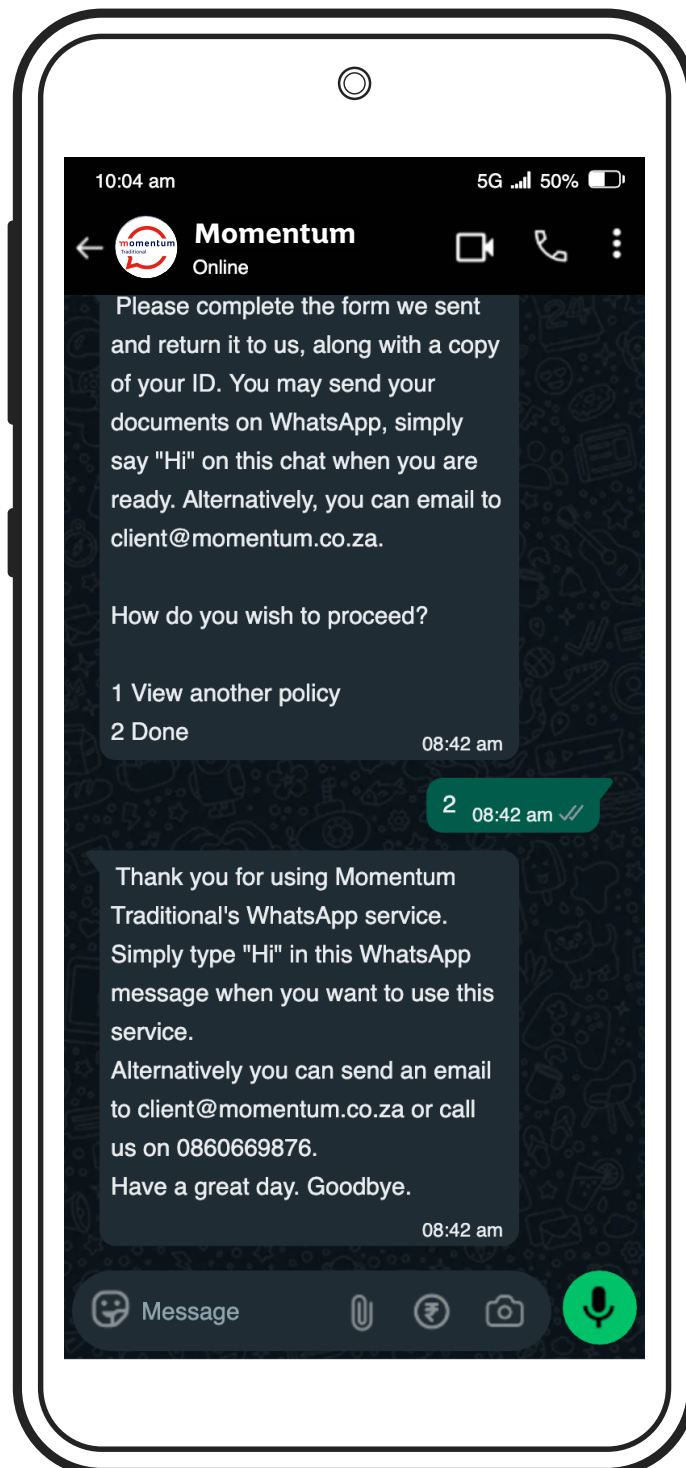
Step 7:

After you received the application form, type "2" to select the menu item "Done".
You'll receive a thank you message that includes our contact information.
You may send your documents to the same number on WhatsApp.
Simply type "Hi" and send your message when you are ready to send us your completed and signed form and a copy of your ID. You will receive the same options as we mentioned in Step 1 and this time you will type "1" to receive the instructions on how to submit your documents.
You can also email the documents to client@momentum.co.za if you prefer.

Get in touch

For more information, you can get in touch with a service specialist.

ShareCall number: 086 066 9876

Telephone number: +27 (0)11 505 1555

268 West Avenue, Centurion, 0157

www.momentum.co.za