

Application for Mandatory AdviceFee

2026

Important note:

- Momentum Medical Scheme members may choose to make use of additional products available from Momentum Group Limited and its subsidiaries as well as Momentum Multiply (herein collectively referred to as Momentum). Momentum is not a medical scheme and is a separate entity to Momentum Medical Scheme. Momentum products are not medical scheme benefits. You may be a member of Momentum Medical Scheme without taking any of the products offered by Momentum.
- This form needs to be completed by companies that have opted for the Mandatory AdviceFee for all of their employees on Momentum Medical Scheme.
- Please email the completed and signed form to us at healthnewbusiness@momentumhealth.co.za.

1: Employer information

Name of employer	<input type="text"/>		
Existing group number	<input type="text"/>	<input type="text"/>	<input type="text"/>
Business telephone number	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email address	<input type="text"/>		
Physical address	<input type="text"/>		
	<input type="text"/>	Postal code	<input type="text"/>
Postal address (if different)	<input type="text"/>		
	<input type="text"/>	Postal code	<input type="text"/>

2: Financial adviser (where applicable)

Name	Financial adviser's code	Broker house code	Commission ref no
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Signature of financial adviser	<input type="text"/>	Date	<input type="text"/>
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3: Company payment details

(Please do not provide credit card details. Momentum is not allowed to record your credit card details)

Name of account holder	<input type="text"/>		
Name of bank	<input type="text"/>		
Account number	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account type	Current/Cheque <input type="text"/>	Savings <input type="text"/>	Transmission <input type="text"/>
Branch code	<input type="text"/>	Branch name	<input type="text"/>
Starting date	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please note that the complementary product(s) will only be activated upon successful activation of your Momentum Medical Scheme membership.

Notes:

- The deduction date is the first working day of the month.
- The abbreviated name as registered with the bank, which will reflect on your bank statement, is Advice Fee followed by your group number.

3: Company payment details (continued)

Momentum may debit the above account with the amounts due under the specific contracts in accordance with the Momentum debit order system. We agree to inform Momentum in writing of any changes that take place. We authorise Momentum to verify such bank details with our bank.

Name

Position in company

By signing below, you confirm that you are authorised to sign on behalf of the company.

Authorised signatory	<input type="text"/>	Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Company stamp	<input type="text"/>								

4: Contract details

Choose either the AdviceFee amount per option in Section 4.1, or the total negotiated AdviceFee amount in Section 4.2.

4.1 AdviceFee amount per option

Please choose only one AdviceFee amount per option below. The amount chosen will apply to all employees in your company who are on the specific option. The amounts will be reviewed annually thereafter.

Ingwe Option

R64 R122 R161 R191 or Negotiated amount per member R or Not applicable

Evolve Option

R64 R122 R161 R191 or Negotiated amount per member R or Not applicable

Custom Option

R64 R122 R161 R191 or Negotiated amount per member R or Not applicable

Incentive Option

R64 R122 R161 R191 or Negotiated amount per member R or Not applicable

Extender Option

R64 R122 R161 R191 or Negotiated amount per member R or Not applicable

Summit Option

R64 R122 R161 R191 or Negotiated amount per member R or Not applicable

4.2 Negotiated AdviceFee

This is the total negotiated amount that will be paid monthly for all employees on Momentum Medical Scheme.

Monthly negotiated amount payable R

5: Terms and conditions

- I acknowledge that the financial adviser has agreed to render certain services to our employees arising from their membership of Momentum Medical Scheme.
- The services that the financial adviser has agreed to render to our employees include, but are not limited to:
 - handling enquiries in relation to their membership of Momentum Medical Scheme
 - keeping Momentum Medical Scheme informed of changes in their membership details
 - informing them of changes in their contributions to Momentum Medical Scheme, and
 - advising them of changes to the product and benefits that Momentum Medical Scheme offers.
- If the "Standard AdviceFee" option is selected, the AdviceFee will be reviewed annually when our employees' contributions to Momentum Medical Scheme are reviewed and increased by a rate based on the average contribution increase to Momentum Medical Scheme. I will receive reasonable written notice of any such intended change.
- The agreement will start from the start date mentioned below and will end when the financial adviser is not entitled to receive compensation for our employees' membership of Momentum Medical Scheme for any reason whatsoever.
- I acknowledge that this fee will not form part of our employees' contribution to Momentum Medical Scheme and will therefore be a separate charge.
- I instruct Momentum Metropolitan Life Limited to collect the above AdviceFee, on the due date, in terms of the payment details given in this application and pay the financial adviser on the company's behalf.

5: Terms and conditions (continued)

Start date

0	1	M	M	Y	Y	Y	Y
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(Please note that the start date can only be future dated)

By signing below, you confirm that you are authorised to sign on behalf of the company.

Authorised signatory	<input type="text"/>	Date	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y				
Company stamp	<input type="text"/>										