



# Momentum Intermediary Coaching Programme

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## Programme overview

Momentum Metropolitan Holdings (MMH) in partnership with the Association of Savings and Investment South Africa (ASISA), Fundhouse and Edge Growth invite you to join our bespoke 12-month Intermediary Development Programme that will equip you to remain relevant in a rapidly changing industry. This Programme aims to develop essential behavioural coaching skills, preparing you in the best way possible to coach your clients and ensure they reach their life and financial goals. By learning how to successfully navigate between your roles as both life-planner and financial adviser, you will be a professional who operates optimally where people's lives meet their money.

## The Programme offers:

- Six workshops, six group coaching sessions and six check-in sessions, run over 12 months on a digital platform via Zoom.
- Input from a range of industry specialists
- Online resources and an engagement platform

## Programme themes:

1. **Investment decision-making by clients and financial advisers** – what drives their investment decisions?
2. **The benefit of adopting a coaching approach in the financial planning and advice process** – what does integrating a coaching approach into interactions with clients entail for financial advisers?
3. **Implementing a coaching approach in your interactions with clients** – unpack how a coaching approach helps to build trust with clients and positively changes engagement with clients.
4. **Striking a balance between coaching and financial advice** – how to find the balance between offering advice and acting as a coach to your client.
5. **The role of emotions in decision-making** – unpack the significant influence of emotions on decision-making, particularly when it comes to money matters. How does this affect and influence your client and what can you do about it?
6. **Help clients integrate their decisions about life and money** – every client's life is influenced by their past experiences and life story which impacts both their perspective on their life, as well as money and related financial decisions. How can you help them to integrate these domains?

## Programme fee:

The full price of the 12-month Programme is R19 800 inclusive of vat. This may be payable in monthly instalments of R1 650 inclusive of vat for 12 months.

## Do you qualify for potential financial support for the Programme fee from MMH?

If you are a 51% black owned and/or 51% black women owned Exempt Micro Enterprise (EME) or a Qualifying Small Enterprise (QSE) (a majority black owned and/or black women owned business entity generating a turnover of between R0m and R50m per annum) according to the Department of Trade and Industry (DTI) B-BBEE Codes of Good Practice, then you are eligible to apply for financial assistance for the Programme through the Enterprise and Supplier Development Funds of MMH. The financial support is subject to meeting the qualifying criteria and being successful in the Programme application process. If an applicant is unsuccessful in their financial support application, the applicant will be given the opportunity to pay the full price of the Programme.



## Application form

Please complete and send the application form with requested documents to: [nndlovu@edgegrowth.com](mailto:nndlovu@edgegrowth.com)

The following application conditions apply:

1. In completing this application, it is expected that the applicant has read and understood the purpose of the Programme and Programme fee as per the application form in conjunction with the Programme marketing brochure.
2. All information received in this application form will be treated with strict confidentiality.
3. The application and documentation of all applicants will be assessed to validate all applications, and interviews may be required in certain instances, where additional information is required before successful candidates are selected.
4. Applicants are required to be a registered Independent Financial Adviser (IFA).
5. All shareholders/members must be in agreement with the Programme application and process.
6. Applicants submitting false information or documentation will be disqualified from the Programme.
7. All application submissions confirm availability of key business principals for development and training through the Programme should the application be successful.
8. Incomplete applications will not be considered.
9. Given that there are limited spaces available on the Programme, MMH and related partnership parties reserve the right to accept or decline your application.
10. Key performance metrics i.e. revenue, growth in client base will be tracked on a quarterly basis during the course of the Programme and post Programme performance data will be requested from participants from time to time.
11. The following documentation will be requested from the applicants:
  - a. Company profile demonstrating the following:
    - i. Value proposition and service offering,
    - ii. Company footprint,
    - iii. Copies of any rating, accreditation and certificates.
12. Willingness to sign a Programme commitment contract for a 12-month period.



## Practice details

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FSP Number:	<input type="text"/>
Practice name:	<input type="text"/>
Website address:	<input type="text"/>
Telephone number:	<input type="text"/>
Email address:	<input type="text"/>
Key contact person:	<input type="text"/>
Key contact person cell no:	<input type="text"/>
Physical street address, line 1:	<input type="text"/>
Physical street address, line 2:	<input type="text"/>
Province:	<input type="text"/>
City:	<input type="text"/>
Postal code:	<input type="text"/>
Postal address, line 1:	<input type="text"/>
Postal address, line 2:	<input type="text"/>
Province:	<input type="text"/>
City:	<input type="text"/>
Postal code:	<input type="text"/>

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## Personal details of applicant

Title:	<input type="text"/>
First name:	<input type="text"/>
Last name:	<input type="text"/>
Preferred name:	<input type="text"/>
Date of birth:	<input type="text"/> [dd/mm/yyyy]
Identity number:	<input type="text"/>
Gender:	Male <input type="checkbox"/> Female <input type="checkbox"/>
Cellphone number:	<input type="text"/>
Day time contact number:	<input type="text"/>
Email address:	<input type="text"/>
Years of proven experience in financial advisory capacity:	<input type="text"/>
What financial planning qualifications, accreditations, and/or certifications have you obtained? Please attach documentation.	<input type="text"/>



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## Practice Profile

Black ownership %:	<input type="text"/>
Black women ownership %:	<input type="text"/>
B-BBEE level: Please attach valid BEE certificate.	<input type="text"/>
Business size:	<input type="text"/>
Annual turnover for current year:	<input type="text"/>
Years in operation: (Please attach company profile)	<input type="text"/>
Prime geographical of operations: (Please attach company profile)	<input type="text"/>
Total number of employees:	<input type="text"/>
Total number of financial advisers:	<input type="text"/>
Total number of support staff:	<input type="text"/>
Total number of temporary staff:	<input type="text"/>

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## Practice key business services

What is your standard value proposition and service offering (please attach company profile)?	<input type="text"/>
What percentage (%) of revenue does the business make from the following services:	
Life insurance:	<input type="text"/>
Short-term insurance:	<input type="text"/>
Investments:	<input type="text"/>
Medical aid:	<input type="text"/>
Employee benefits:	<input type="text"/>
Funeral insurance:	<input type="text"/>
Other (please specify):	<input type="text"/>
Total number of clients:	<input type="text"/>



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## Programme specifics and motivation

Are you applying for financial support for the Programme?

☐ Yes ☐ No

What motivated you to choose a career in financial planning?

Please provide a brief outline in your own words regarding how you feel this opportunity will assist you and your business:

Have you previously been part of an industry-recognised practice management development Programme, where your attendance can be referenced through a Programme attendance and/or participation letter? Please attach any available documentation.

☐ Yes ☐ No

Are you willing to sign a commitment agreement and complete and submit all Programme documentation and provide business information prior to commencement of the Programme?

☐ Yes ☐ No

Please provide a brief outline of your financial coaching needs:

Do you agree that all the information provided is accurate and true?

☐ Yes ☐ No

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## Checklist

Have you completed the application form by populating all applications fields?

☐ Yes ☐ No

Have you provided all the requested documentation?

☐ Yes ☐ No

- a. Company Profile detailing value proposition and service offering and company footprint,
- b. Copies of qualifications, rating, accreditation and/or certificates.