



Momentum Intermediary Coaching Programme

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 required to pay the full price of the Programme.



Registration form

Please complete and send the registration form and requested documents to adviser@fundhouse.co.za

1. In completing this registration, it is expected that the registrant has read and understood the purpose of the Programme and Programme fee as per the registration form in conjunction with the Programme marketing brochure.
2. All information received in this registration form will be treated with strict confidentiality.
3. Registrants are required to be a registered Independent Financial Adviser (IFA).
4. Key performance metrics i.e. revenue, growth in client base will be tracked on a monthly and/or quarterly basis during the course of the Programme and post Programme performance data will be requested from time to time.

Practice details

FSP Number:

Practice name:

Website address:

Telephone number:

Email address:

Key contact person:

Key contact person cell no:

Physical street address, line 1:

Physical street address, line 2:

Province:

City:

Postal code:

Postal address, line 1:

Postal address, line 2:

Province:

City:

Billing Details:

Company name:

Vat registration no:

Billing email address:



Personal details of registrant

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"/>

Practice Profile

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"/>



Practice key business service

What is your standard value proposition and service offering (please attach company profile)?

What percentage (%) of revenue does the business make from the following services:

Life insurance:

Short-term insurance:

Investments:

Medical aid:

Employee benefits:

Funeral insurance:

Other (please specify):

Total number of clients:

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.

Terms and conditions

Detailed description of goods and services:

Fundhouse has been appointed to facilitate, co-ordinate and administer the Momentum Intermediary Coaching Programme (hereafter referred to as "the Programme").

This appointment requires Fundhouse to deliver the following services:

- Act as Lead Facilitator of the Programme,
- Co-ordinate all electronic communication related to the Programme,
- Process all payments made by Participants in the Programme.



Terms and conditions

Termination of Agreement

Due to the nature of the goods/services being offered, once you and Fundhouse have concluded a binding agreement in relation to the Programme, both parties will be bound until such time as we have completed our respective obligations as provided under this agreement.

Early termination terms

The Programme cost is calculated based on the costs of developing, co-ordinating and delivering the Programme, with various co-facilitators, guest speakers and accompanying material. This is then accommodated with a monthly payment structure over the 12 months of the Programme.

Should a registered paying member of the Programme choose to cancel their membership prior to the end date (refer to "Membership costs and term of membership" for description of relevant dates) then an early termination fee will be liable.

The early termination fee for the cancelling member will be 50% of the remaining total balance for the 12-month period that is due.

Overdue accounts

Interest will be levied on all overdue accounts at 2% above the prime interest rate. Such interest shall be calculated monthly in advance, on the first date of each succeeding month, on the outstanding balance due by the customer to Fundhouse and for the period during which such balance remains due, owing and payable. For the purposes of this agreement, an account is deemed to be overdue if not settled within the first 30-day period.

Fundhouse reserves the right to suspend an overdue account should the member refuse to pay. Suspended account holders will no longer have access to any Programme resources and will be unable to receive Programme material and attend contact sessions until such time as all monies owing have been settled in full.

Disputes

In the event of any dispute of any nature whatsoever arising between you and Fundhouse on any matter provided for in, or arising out of these Ts&Cs, and not resolved through the Director of Adviser Services of Fundhouse, then such a dispute shall be submitted to confidential arbitration in terms of the expedited rules of the Arbitration Foundation of South Africa. Arbitration proceedings shall be conducted in Cape Town in English.

Address for delivery of important documents and communications

Fundhouse chooses as its domicilium citandi et executandi (i.e. its address) for all purposes under these Ts&Cs, whether in respect of court process, notice, or other documents, the following address: 5th Floor, MontClare Building, Corner of Main Road and Campground Road, Claremont.

Any communications of an operational nature or in relation to which you require assistance with regard to the Programme must be addressed to adviser@fundhouse.co.za

Customer privacy policy

Further information regarding the manner in which we respect the privacy of users' personal information is contained in our Privacy Policy: <https://programme.fundhouse.co.za/profile/privacy-policy>

Payment terms and conditions

This registration form represents an offer to Fundhouse to register for the Programme and is accepted by Fundhouse when we send you an email confirming acceptance of your order. A legally binding contract between you and Fundhouse is created at the point of receipt of your registration form by Fundhouse.



Payment methods

Payment is accepted via debit order only. This excludes private stop orders. Members must complete the Fundhouse debit order mandate which must be signed and received by Fundhouse before your order can be confirmed and your acceptance to the Programme confirmed.

Upfront payments can be accommodated with a once off Electronic Funds Transfer (EFT), details are available on request.

On receipt of payment each month, an email containing your invoice will be sent to the email address you provide in your order details.

Fundhouse reserves the right to choose not to accept your order for any reason, at its discretion, and will not be liable to you or anyone else in those circumstances.

Refund policy

A refund will be considered where the user has exercised a 7-day cooling off period termination right subsequent to their placing of an order.

Membership costs and term of membership:

Programme members agree to a monthly payment for the duration of the 12-month Programme (unless this has been settled up front in full).

The first payment is due 1 February 2021, and the final payment is due 1 January 2022.

Please note that should the end date change that all payments will still be due prior to the final module's workshop session being held.

Price

The full price of the 12-month Programme is R19 800 including VAT.

May be payable in 12 monthly instalments of R1 650 including VAT per month.

Value added tax

Value added tax at the prevailing rate of 15% is charged on goods and services bought by South African residents. Value added tax at a rate of 0% is charged on goods and services bought by non-South African residents.

Terms and conditions pertaining to Programme membership

When registering to become a Programme member, participants agree that:

- > They will provide full and accurate information on their registration form;
- > They will abide by the rules of the Programme's electronic communication platform which will be communicated as and when required; and
- > Members warrant that they will at all times act in accordance with these Ts&Cs and agree to indemnify Fundhouse in the event that they breach these Ts&Cs.

When using the Programme's electronic communication platform, members further undertake not to:

- > Impersonate any other person or use a false or unauthorised name so as to create a false identity and/or email address or to misrepresent themselves;
- > Make available or upload files that contain software or any other material not owned or licensed to the member;
- > Make use of the electronic platform to collect, harvest or otherwise obtain personal information relating to other users or members.



Do you agree to the cancellation terms detailed in the terms and conditions?

☐

Yes

☐

No

I confirm that I have read and accept the terms and conditions.

I agree to the use of the information available online and content in my capacity as a professional financial adviser, and I undertake not to disseminate or distribute this information to third parties other than as expressly intended by Fundhouse.

Signature: _____

Date: _____



Please complete and send to us at: adviser@fundhouse.co.za

BANK DEBIT ORDER INSTRUCTION

Name (Debtor):	<input type="text"/>	Date:	<input type="text"/>
Address:	<input type="text"/>	Debit amount:	<input type="text"/>
		Debit order commencement date:	<input type="text"/>
Contact no:	<input type="text"/>	Abbreviated name as it will appear on your statement: FUNDHOUSE	

Dear Sir/Madam

The details of my/our account are

BANK:	<input type="text"/>
BRANCH/TOWN:	<input type="text"/>
BRANCH NO:	<input type="text"/>
ACCOUNT NAME:	<input type="text"/>
ACCOUNT NO:	<input type="text"/>
TYPE OF ACCOUNT:	<input type="text"/>

This signed Authority and Mandate refers to our contract as dated as on signature hereof ("the Agreement"). I/We hereby authorise you to issue and deliver payment instructions to the bank for collection against my/our abovementioned account at my/our above mentioned bank (or any other bank or branch to which I/We may transfer my/our account) on condition that the sum of such payment instructions will never exceed my/our obligations as agreed to in the Agreement, and commencing on the commencement date and continuing until this Authority and Mandate is terminated by me/us by giving you notice in writing of no less than 20 ordinary working days, and sent by prepaid registered post or delivered to your address indicated above.

The individual payment instructions so authorised to be issued must be issued and delivered as follows

- I. On the first day ("payment day") of each and every month commencing on _____. In the event that the payment day falls on a Saturday, Sunday or recognised South African public holiday, the payment day will automatically be the very next ordinary business day. Further, if there are insufficient funds in the nominated account to meet the obligation, you are entitled to track my account and re-present the instruction for payment as soon as sufficient funds are available in my account;
- II. Monthly; on or after the dates when the obligation in terms of the Agreement is due and the amount of each individual payment instruction may not be more or less than the obligation due;

I/We understand that the withdrawals hereby authorised will be processed through a computerised system provided by the South African Banks and I also understand that details of each withdrawal will be printed on my bank statement. Each transaction will contain a number, which must be included in the said payment instruction and if provided to you should enable you to identify the Agreement. A payment reference is added to this form before the issuing of any payment instruction. I/We shall not be entitled to any refund of amounts which you have withdrawn while this authority was in force, if such amounts were legally owing to you.



MANDATE

I/We acknowledge that all payment instructions issued by you shall be treated by my/our above-mentioned bank as if the instructions had been issued by me/us personally.

CANCELLATION

I/We agree that although this Authority and Mandate may be cancelled by me/us, such cancellation will not cancel the Agreement. I/We shall not be entitled to any refund of amounts which you have withdrawn while this authority was in force, if such amounts were legally owing to you.

ASSIGNMENT

I/We acknowledge that this Authority and Mandate has been ceded to Netcash (Pty) Ltd as per your agreement with Netcash (Pty) Ltd, but in the absence of such assignment of the Agreement, this Authority and Mandate will be null and void.

Signed at _____ on this _____ day of _____ 20

SIGNATURE AS USED FOR SIGNING CHEQUES OR CREDIT CARD VOUCHERS

FOR OFFICE USE

AGREEMENT REFERENCE NUMBER

This Agreement reference number is: _____