momentum
investments

Digital Solutions

Momentum Wealth International

Momentum Wealth International (MWI) provides specialist investment management services and administration services to financial advisers and their clients.

We help you grow your business by providing products, services and tools that enable you to deliver exemplary client service and performance in line with your investors' expectations. We are based and regulated in Guernsey.

Digital solutions for the modern adviser

We understand the importance of technology in your practice and the role it plays in helping you deliver exceptional service to your clients. Our investment platform provides the perfect investment solution to empower you and your advisory practice to effectively manage your day to day requirements.

We also have the latest industry leading website security features that give you peace of mind knowing that your interaction with us is safe and secure throughout your transactional and reporting requirements.

Enabling your practice

Our online adviser platform is purposefully built around adviser experiences and requirements. A range of practice management functions such as simple navigation and layouts, client searches, client document searches and tools allows you as an adviser to spend more time on what matters most, making your client objectives reality.

Simply log in to your online profile using any internet-enabled device to unlock the capabilities available on our website (momentum.co.gg). You can contact us to get your login details or if you experience any technical difficulties, please contact our helpdesk.

Technical support number: 0860 44 44 33

Email: client.services@momentum.co.gg

We understand the importance of technology in your practice and the role it plays in helping you deliver exceptional service to your clients.

Digital features available at MWI

Simplified layout and navigation

From the moment you log in, the website offers simple and easy-to-use navigation with a dual layer of website functionality (advisory firm level and adviser level navigation).

Filter client information

Filter your client list based on various criteria to gain further information and insights into your client book.

Tools

Access a wide range of tools to enhance your practice and service offering to your clients.

- Portfolio construction – Effortlessly navigate and construct portfolios for all clients. Create a favourites list for future use.
- Portfolio X-ray – Analyse the composition of your portfolios using Morningstar's innovative X-ray tool.
- Capital gains and tax calculator –Allows you to calculate the capital gains or tax implications on client portfolios.
- Internal rate of return calculator - Assist with calculating the investment returns on client portfolios.
- Currency converter – An easy foreign exchange rate calculator.
- Forex provider – Seamless integration with MWI's currency partner for tax clearance and forex.

Client book reporting

Access various book reports for example: a summary of your clients' investments, your adviser fee statement or your assets under management. It is updated daily to ensure that you never miss out on valuable client engagement opportunities.

Document library

Easily find and navigate through client documents for example: statements, tax statements, dealing information as well as documents relating to past transactions.

Simplify your administration processes, from emailing bulk statements to personalising the way you communicate to your clients.

Online switching

Our online switching functionality enables you to respond immediately in line with your clients goals and risk appetite. Password protection ensures that online switching is as secure as traditional switching methods. A detailed record of submitted online switches is available.

Model portfolio functionality

As a Discretionary Investment Manager you can create and manage one or more model portfolios for your clients. Our investment platform offers you enhanced transacting capabilities allowing you to monitor, analyse and transact on your model portfolios.

For more information, please refer to our Discretionary Investment Manager Solutions brochure available our website (momentum.co.gg).

Contact us:

Write to us
Momentum Wealth International Limited
La Plaiderie House
St. Peter Port
Guernsey
GY1 1WF

PO Box 7400, Centurion
0046, South Africa

Call us
Tel +27 (0) 12 684 5008

Call us (from South Africa)
ShareCall number
0860 44 44 33

Email us
client.services@momentum.co.gg

Visit us on our website
www.momentum.co.gg

Momentum Wealth International Limited
Registered address: La Plaiderie House, La Plaiderie, St Peter Port, Guernsey Channel Islands, GY1 1WF
Postal address: PO Box 166, La Plaiderie House, La Plaiderie, St Peter Port, Guernsey Channel Islands, GY1 4HE
T +44 (0) 1481 735 480 momentum.co.gg

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