

Personal information form

Policy/Contract number

Important

1. We require the information below to ensure the accuracy of the personal data which we maintain about you in respect of the policy (policies) or contract(s) you hold with Momentum Metropolitan Life Limited (Momentum). You are notified of your right to access the personal information in the possession of Momentum Metropolitan Holdings Limited and to request correction thereto in a manner and format prescribed by the law.
2. Please attach a clear copy of your identity document (RSA identity document, both sides of the smart ID card, driver's license or passport).
3. Based on the information you provide, we may ask for additional information and documents.

1: Personal details

Surname	<input type="text"/>																
Title	<input type="text"/>	Preferred name	<input type="text"/>														
Full names (As indicated on RSA identity document/passport/driver's licence)	<input type="text"/>																
Identity/Passport number	<input type="text"/>	Date of birth	<input type="text"/>														
Issue date of passport	<input type="text"/>	Expiry date of passport	<input type="text"/>														
Country of issue	<input type="text"/>																
Physical address	<input type="text"/>																
	<input type="text"/>																
	City/Town	<input type="text"/>							Postal code	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
Please provide the postal address if it is different from the physical address above.																	
Postal address	<input type="text"/>																
	City/Town	<input type="text"/>							Postal code	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
Cell phone number	<input type="text"/>					Other	<input type="text"/>										
Email address	<input type="text"/>																
Language preference	<input type="text"/>		<input type="text"/>		Gender				<input type="text"/>		<input type="text"/>						
South African Revenue Service (Sars) income tax reference number	<input type="text"/>																
If you do not have a tax number, give the reason	<input type="text"/>																

2: Declaration by the client

1. The information I provide is true and correct. I made sure that all details of this form were completed. I will not hold Momentum liable for any loss or damages if someone changes this form after I sign it.
2. I am aware that the Financial Intelligence Centre Act (Fica) applies and I will comply with its requirements.
3. I agree that Momentum can share my personal information with Momentum Metropolitan Holdings Limited, its subsidiaries and contracted service providers in order to properly administer my investment/policy and provide me with Financial Wellness information.
4. I will let Momentum know if any of the details I provided changes.

Signed at	<input type="text"/>														
Signature of client	<input type="text"/>							Date	<input type="text"/>						

Momentum Metropolitan Life Limited

Momentum is part of Momentum Metropolitan Life Limited, an authorised financial services and registered credit provider. Reg no 1904/002186/06
Refer to the company websites for directors and company secretary details momentum.co.za momentummetropolitan.co.za