

1 Augustus / August 2008

BEKENDSTELLINGSBRIEF / LETTER OF INTRODUCTION

PERSOONLIKE BESONDERHEDE / PERSONAL DETAILS			
Titel en Naam / Title and Name	Mnr / Mr. Christian Lodewicus Moolman		
ID	6805055072082		
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Regsbevoegdheid / Legal Status	Verteenwoordiger van Globalwise Financial Services CC / Representative of Globalwise Financial Services CC		
FSCA Licence Nr	22179		
Gemagtigde FSCA produkkategorië / Authorised FSCA product categories	1.1; 1.2; 1.3; 1.4; 1.5; 1.6; 1.7; 1.14; 1.16; 1.17; 1.18; 1.20; 1.21; 1.22; 1.23		
PA - Dekking / PI Cover	Southern Cross Risk Management (Pty) LTD		
Hoogste kwalifikasie / Highest qualification	HOD / HTD, Wealth Management 120 krediete/credits		
Ondervinding / Experience: Begin September 1992, 9 maande Liberty Bemerkingsadviseur, 4 jaar Momentum Bemerkingsadviseur, 10 jaar Momentum Streekbestuurder, 11 maande PSG Finansiële Beplanner, Sedert 2008 Onafhanklike Finansiële Adviseur aook Sleutelpersoon vir Globalwise Financial Services CC / Started September 1992, 9 months Liberty Marketing Advisor, 4 years Momentum Marketing Advisor, 10 years Momentum Regional Manager, 11 months PSG Financial Planner, Since 2008 Independent Financial Advisor and Key Individual : Globalwise Financial Services CC			
NAKOMING / COMPLIANCE			
Nakomingsbeampte / Compliance Officer	Masthead Compliance (Pty) Ltd / Gideon Potgieter (B. Proc)		
Tel, Faks, E-pos / Tel, Fax, E-mail	051 401 8300 / 082 372 0332 gpotgieter@masthead.co.za		
Praktyk Nommer / Practice Number	67		
VERSEKERAARS EN BELEGGINGSHUISE VERTEENWOORDIG / INSURERS AND INVESTMENT PRODUCT HOUSES REPRESENTED			
Langtermyn en Beleggingshuise / Longterm and Investment Houses	1. Momentum & Momentum Wealth	5. Sanlam & Sanlam Glacier	
	2. Liberty & Stanlib	6. Hollard Life	9. FMI
	3. Discovery Life & Discovery Invest	7. Old Mutual & Old Mutual Wealth	10. ABSA Pensioenfondse
	4. PPS & PPS Invest	8. PSG Asset Management	11. Bright Rock
Mediese Fondse / Medical Aids	1. Momentum Health	4. Bonitas	
	2. Discovery Health	5. Medshield	8. Topmed
	3. Medihelp	6. Fedhealth	
Gapingsdekking / Gap Cover	1. Liberty Health	2. Stratum	
Korttermyn: Persoonlik en Kommersieel / Short Term: Personal and Commercial	1. Santam	6. Cross Country	11. PPS Short Term
	2.PPS	7. Old Mutual Insure	12. Hollard Easy
	3. First Prop	8. Safire	13. ONE
	4. CIA	9. Merx	14. Discovery Insure
	5. B&B Sure	10AC&EEngineering	
Eise en klagte prosedure: Stel Finansiële Adviseur skriftelik in kennis / 'Claims and complaints procedure: Inform Financial Advisor in writing			
Kommissie en fooie moet aan klient openbaar word / Commission and fees must be disclosed to the client			
Versekerars by wie meer as 30% besigheid geplaas word / 'Insurers who receive more than 30% of business			
1. Momentum	2. Glacier (Sanlam)	3. Old Mutual Insure	4. Santam

Kliënt / Client

Datum / Date: _____

Finansiële Adviseur / Financial Advisor