Investment illustration for

Fee and benefit proposal

|  |  |  |  |
| --- | --- | --- | --- |
| Investor details | | Financial adviser details | |
| Investor  {if}Date of birth  Proposal date  Investment start date  Product  {if}End of restriction period  {if}Investment term  {if}Retirement age  {if}Tax status  Existing assets | {Name}  {Date of birth}  {Proposal date}  {Investment start date}  {product name}  {Maturity date}  {term}  {retirement age}  {tax status}  R{Existing assets} | Financial adviser  Financial services provider (FSP)  Telephone  Email  Indicated FSP licence types | {Broker name}  {Broker house name}  {Broker Tel}  {Broker email address}  {License codes} |
| Momentum Wealth details | |
| Telephone  Fax  Email | {Appl Tel for broker class}  {Appl Fax for broker class}  {Appl email for broker class} |

Investment summary

|  |  |  |
| --- | --- | --- |
| {If lump sum}Lump sum investment | Value | Percentage |
| Investment amount | R {Inv amount} |  |
| {if}Initial advice fee | - R {RandIniAdv} | {IniAdv%} |
| {if}Initial distribution fee | - R {RandIniAgen} |  |
| {if}Initial administration fee | - R {RandIniAdm} | {IniAdm%} |
| Net investment amount | R {Net inv amount} | {Net inv %} |

|  |  |  |
| --- | --- | --- |
| {If regular}Regular investment | Value | Percentage |
| Investment amount every {frequency (month/three months/six months/year)} | R {Inv amount} |  |
| {if}Initial advice fee | - R {RandIniAdv} | {IniAdv%} |
| {if}Initial agency charge | - R {RandIniAgen} |  |
| {if}Initial administration fee | - R {RandIniAdm} | {IniAdm%} |
| Net investment amount | R {Net inv amount} | {Net inv %} |

  
Illustration 1: CRAPTION

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