momentum
health

Request to appoint a financial adviser

Important notes

- Complete this form to change your financial adviser.
- Requests must be received before the 15th of every month for the change to be effective on the first of the following month and cannot be backdated.
- If an employer is appointing a new financial adviser, section 5 may only be signed by authorised person.
- Return this form to your Momentum Marketing Adviser or fax it to 031/580-0437.

Section 1: Member Details

Member number

Initials

Surname

Section 2: Employer Details

Employer name

Group number

Section 3: New financial adviser's details

Surname

Initials

Broker house

Personal code

House code

Telephone

Cell phone

E-mail adress

Signature of financial adviser

Date D D – M M – 2 0 Y Y

Section 4: Marketing adviser's details

Surname

Initials

Personal code

MDS branch

Telephone

E-mail address

Section 5: Authorisation by member or employer

Surname

Initials

First name

Designation

Signature of authorised signatory

Date D D – M M – 2 0 Y Y