



Installation form for new participating employer

Section 1: Details in respect of the Owner/Partner

Title	<input type="text"/>	Initials	<input type="text"/>
First name	<input type="text"/>		
Surname	<input type="text"/>		
Telephone number	<input type="text"/>	Cellphone number	<input type="text"/>

Section 2: Details in respect of Business

Registered name of the business:	<input type="text"/>		
Registered number of business:	<input type="text"/>		
Business trading as:	<input type="text"/>		
Physical Address:	<input type="text"/>		
	<input type="text"/>	Postal code	<input type="text"/>
Postal address:	<input type="text"/>		
	<input type="text"/>	Postal code	<input type="text"/>
Telephone number:	<input type="text"/>	Fax number	<input type="text"/>
Email address:	<input type="text"/>		

Section 3: Details in respect of Contact Person and Alternative Contact Person

All communication to the employer will be via email.

Contact person

Full name	<input type="text"/>		
Email address	<input type="text"/>		
Telephone number	<input type="text"/>	Cellphone number	<input type="text"/>

Alternative contact person

Full name	<input type="text"/>		
Email address	<input type="text"/>		
Telephone number	<input type="text"/>	Cellphone number	<input type="text"/>

Section 4: Details in respect of Broker (If applicable)

The following broker and or broker house has been appointed by the Participating Employer from the installation date and is authorized to receive the statutory commission.

Full name of Brokerage		Broker Code	
Full name of Broker		FSP Number	
Email Address			
Telephone number		Cellphone number	
Postal address			
		Postal Code	

Key notes:

- Where a broker is appointed by the Employer, an appointment letter on a letterhead from the Employer must accompany the installation form.
- The Installation Form must be accompanied by a copy of the FSP license of the Broker and the Sub-categories they are accredited to provide advice and/or intermediary services for.
- The broker fees will be deducted from the employer's contribution and thereby reduce the member's net retirement savings. Members must therefore be informed of the appointed of the Broker to their retirement fund.

Section 5: Details in respect of membership

Commencement date - -

Date of first contribution - -

Note: Please note that contributions are payable to the Fund not later than seven days after the end of the month for which such contributions are payable.

Section 6: Contributions payable in terms of the Rules of the Fund

Options in terms of the Rules of the Fund

Option 1: 6% employee / 6% employer	<input type="checkbox"/>	Option 2: 6.5% employee / 7.5% employer	<input type="checkbox"/>
Option 3: 7% employee / 7% employer	<input type="checkbox"/>	Option 4: 7.5% employee / 7.5% employer	<input type="checkbox"/>
Option 5: 8% employee / 7.5% employer	<input type="checkbox"/>	Option 6: 5% employee / 5% employer	<input type="checkbox"/>
Option 7: 4% employee / 4% employer (only applicable for the first 12 months of membership in the Fund. After the 12 months, the default option is Option 6, unless another option is chosen)		<input type="checkbox"/>	

Section 7: Group Life Insurance (Death Benefit) options in terms of the Rules of the Fund

Options in terms of the Rules of the Fund

Option 1: 1 times the Member's Final Salary	<input type="checkbox"/>
Option 2: 4 times the Member's Final Salary	<input type="checkbox"/>

Section 8: Signature

I, the undersigned, hereby declare that the information provided is true and correct and I agree that non-disclosure or misrepresentation of information could result in the policy being declared null and void.

Signed	<input type="text"/>
	Date <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Designation	<input type="text"/>

When you sign this form by inserting a digital signature it confirms that the information provided is true and correct.

Options to sign the form:

1. Print out the form, sign and scan it and send it back to Momentum Retirement Administrators.
2. Place your scanned signature in the signature block.
 - Store your scanned signature in a safe place on your computer.
 - Select the 'comments' tab from your menu in Adobe.
 - Select the 'add stamp' icon.
 - Select custom stamps.
 - Create custom stamps.
 - You can now browse and upload your signature to save it as a custom stamp under 'sign here' in Adobe.
 - You can now go back to your 'stamps' icon and select 'sign here' and select your saved signature.
 - Place it in the document and save the document.