momentum

medical scheme

Broker House: Aon South Africa (Pty) Ltd

Broker House Code: 032259 Tel No: 0860 100 404

Company application form

2023

Important notes:

- Please do not resign from your current medical scheme until you have received written notification of acceptance from Momentum Medical Scheme.
- Complete the application for membership (HEALTH001 or HEALTH003) for each employee's individual option. Each principal member must have started employment by the date that the company joins Momentum Medical Scheme, in order to qualify for membership.
- Please email the completed and signed form to us at healthnewbusiness@momentumhealth.co.za.

Employer information ompany name egal entity egistration number ature of industry OID (workmen's compensation) registration number contact person title Initials First name umame O number elephone - work mail address * usiness physical address usiness postal address (if different) Postal code osition in company Please note that the email address you provide will be used when the Scheme communicates with you. dditional contact person
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itle Initials First name
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O number Gender Male Female
osition in company
elephone - work
mail address
: Financial adviser (where applicable)
Name Financial adviser's code Broker house code Commission ref no
xclusive group Yes No
Signature of financial adviser Date D D M M Y Y Y Y

3: Company's current and	previous medical scheme information		
Name of current medical scheme Date joined	D D M M Y Y Y Y Date to be terminated	D M M	YYYY
Name of current medical scheme			
Date joined	D D M M Y Y Y Y Date to be terminated	D M M	YYYY
4: Details of your compan	y's employee base		
Number of staff your company employs	Number of principal members that Momentum Medical Scheme w	ill cover	
Will Momentum Medical Scheme be comp	oulsory for all employees in the company within a specific group?	Yes	No
If Yes, define the group			
Will Momentum Medical Scheme be comp	oulsory for all future employees who join the company?	Yes	No
Will the company offer any other scheme	o employees?	Yes	No
If Yes, name of scheme			
5: Company payment deta	ails		
(Please do not provide credit card details	s. Momentum Medical Scheme is not allowed to record your credit card details)		
Payment method	EFT (subject to Scheme approval) Debit order (compulsory for employers w	vith 15 or less pri	ncipal members)
Payment in arrears (subject to Scheme ap	proval)	Yes	No
Name of account holder			
Name of bank			
Account number			
Account type	Current/Cheque Savings Transi	mission	
Branch code	Branch name		
Notes:			
The deduction date is the first work			
 The abbreviated name as registere group number will be issued upon a 	d with the bank, which will reflect on your bank statement, is MOMMEDSCH followed activation of your group.	by your group	o number. You
debit order system. Momentum Medical Momentum Medical Scheme bills for co single contribution payable to the Schem	the above account with the amount due under the contract in accordance with the M Scheme will debit the bank account for contributions on the 1st working day of every intributions in advance and dependent on our commencement and activation dates i.e. We may cancel this mandate and pay via other methods within 30 days. If we cancel Momentum Medical Scheme while it was in force.	month. We u	inderstand tha
Name and surname			
Designation			
Name and surname			
Designation			
Authorised signatories			
Dates		Y	
Company stamp			

6: Terms and conditions

- 1. We hereby apply for group membership (as specified in section 4) of Momentum Medical Scheme (the Scheme) administered by Momentum Health Solutions (Pty) Ltd (Administrator).
- 2. We hereby agree to participate in the benefit options as per the terms and conditions of the Scheme.
- 3. We agree that the Rules of the Scheme, as amended from time to time, shall be binding on us. We undertake to observe and carry out (in so far as is applicable to us) our obligations in terms of the agreement with the Scheme.
- 4. The contract will not bind the Scheme until written acceptance is received from the Scheme.
- 5. We agree that no statements, promises or information made or given to us by any other persons shall be binding on the Scheme or affect its rights in any way whatsoever, unless such statements, promises and information is incorporated in writing and accepted by the Scheme.
- 6. We declare and warrant that the answers to the foregoing questions are complete and true, and agree that this application shall form the basis of the agreement with the Scheme and that, if any statements are untrue, membership may be terminated, all benefits reversed and contributions shall be forfeited.
- 7. We confirm that where group membership is compulsory, it will be a condition of employment for all new employees falling into the nominated categories, other than those registered as dependants under another medical scheme, to belong to the Scheme.
- 8. We confirm that no member qualifying for compulsory group membership may terminate his/her membership while in the employment of this company, except for becoming a dependant of his/her partner's medical scheme.
- 9. We acknowledge that the Scheme does not accept liability for any employee until a notice of acceptance is given by the Scheme.
- 10. We undertake to notify the Scheme immediately if any changes, which affect the answers to the application, occur before the Scheme grants written acceptance. This will enable the Scheme to reconsider the terms of acceptance.
- 11. We agree that contributions will be paid monthly and will be submitted to reach the Scheme by no later than the 3rd day of the month for which the amounts are due.
- 12. We accept that if contributions are not paid by its due date for a member, the Scheme will suspend benefits with immediate effect. If the contributions are not paid within 30 days from the suspension date, that employee's membership will be terminated.
- 13. We confirm that we have an arrangement in place with every member according to which we will recover amounts due to the Scheme from such member's income.
- 14. We undertake to give one month's calendar notice to terminate the membership of any employee who leaves the employment of this company. We accept that the Scheme shall not backdate membership terminations and acknowledge that any failure to give proper or timeous notice will result in the company being liable to pay full contributions due to the Scheme up until the last effective date of membership.
- 15. We shall give the Scheme three months' written notice of our intention to withdraw our participation in the Scheme. We acknowledge that failure to give proper notice will result in the full three months' contributions becoming immediately due and payable.
- 16. When the employer's membership of the Scheme terminates, the employer will ensure that the membership of all pensioners linked to that employer's membership of the Scheme is terminated, even though we no longer employ such pensioners. The employer will be responsible for, and hereby indemnifies the Scheme against, any loss or damage, including but not limited to any underwriting loss, which the Scheme may suffer as a result of such pensioners continuing as members of the Scheme.

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Momentum Medical Scheme 201 uMhlanga Ridge Boulevard Cornubia 4339 PO Box 2338 Durban 4000 South Africa Client Service and Authorisation 0860 11 78 59 member@momentumhealth.co.za momentummedicalscheme.co.za Registered in terms of the Medical Scheme Act No 131 of 1998

momentum

Application for complementary products

2023

Important notes:

- You may choose to make use of additional products available from Momentum Metropolitan Holdings Limited (Momentum), to seamlessly enhance
 your medical aid. Momentum is not a medical scheme, and is a separate entity to Momentum Medical Scheme. The complementary products are not
 medical scheme benefits. You may be a member of Momentum Medical Scheme without taking any of the complementary products.
- · If you choose to take any of these products, please complete the contract details for each product you require.

1: AdviceFee (where applicable)

Mandatory AdviceFee: If your company has chosen the Mandatory AdviceFee, please choose the AdviceFee amount per option in Section 1.1, or the total negotiated AdviceFee amount in Section 1.2.

1.1 AdviceFee amount per option

Please choose only one AdviceFee amount per option below. The amount chosen will apply to all employees in your company who are on the specific option. Please note that the standard AdviceFee amounts remain unchanged from 2022 until 31 March 2023, and will only increase from 1 April 2023. The amounts will be reviewed annually thereafter.

Standard monthly amount:	Ingwe	Evolve	Custom	Incentive	Extender	Summit
R51 from 1 January to 31 March 2023 R55 from 1 April to 31 December 2023						
R95 from 1 January to 31 March 2023 R103 from 1 April to 31 December 2023						
R126 from 1 January to 31 March 2023 R136 from 1 April to 31 December 2023						
R150 from 1 January to 31 March 2023 R162 from 1 April to 31 December 2023						
Or negotiated amount per member	R	R	R	R	R	R
Or not applicable						

1.2 Negotiated AdviceFee

This is the total negotiated amount that will be paid monthly for all employees on Momentum Medical Scheme.

Monthly negotiated amount payable:	R				

1.3 Conditional AdviceFee: (Negotiated amount not applicable)

Please complete this section if your company has chosen the Conditional AdviceFee.

The standard AdviceFee amounts remain unchanged from 2022 until 31 March 2023, and will only increase from 1 April 2023.

Please select an amount below and note that all employees who are members of Momentum Medical Scheme will need to complete the AdviceFee section on their individual application for membership form, or submit a completed Application for Conditional AdviceFee form.

R51 from 1 January to 31 March 2023 R55 from 1 April to 31 December 2023	
R95 from 1 January to 31 March 2023 R103 from 1 April to 31 December 2023	
R126 from 1 January to 31 March 2023 R136 from 1 April to 31 December 2023	
R150 from 1 January to 31 March 2023 R162 from 1 April to 31 December 2023	

2: Company payment details (if the company is paying for any of the complementary products) Please indicate which complementary products the company will pay for: No AdviceFee Yes No HealthSaver Yes If yes, does the company subsidise your employees full HealthSaver contribution? Yes No In terms of the Financial Intelligence Centre Act (FICA), we need to successfully perform FICA verification on all companies paying for HealthSaver contributions Please provide the company registration number If your employees have a Momentum Money Card, does the company allow them to use it for: Medical and non-medical merchants, e.g. veterinarians Only medical merchants Multiply Yes No Payment method **EFT** (if granted on Momentum Medical Scheme) Debit order If the company selects to be the contribution payer this will apply to all employees loaded onto the group. If the company does not select to be the contribution payer the member needs to complete the contribution payer information and authorisation for the contribution collection on their application for membership. (Please do not provide credit card details.) Momentum is not allowed to record your credit card details.) Name of account holder Name of bank Account number Current/Cheque Savings Transmission Account type Branch code Branch name Starting date Please note that the complementary product(s) will only be activated upon successful activation of your Momentum Medical Scheme membership. Notes: The deduction date is the first working day of the month. The abbreviated name as registered with the bank, which will reflect on your bank statement, is: HealthSaver: Health Sav followed by your group number AdviceFee: Advice Fee followed by your group number Multiply: Momentum followed by your group number Momentum may debit the above accounts with the amounts due under the specific contracts in accordance with the Momentum debit order system. We agree to inform Momentum in writing of any changes that take place. We authorise Momentum to verify such bank details with our bank. We accept that Momentum may debit our account on a date other than specified. We accept that failure to pay the amount, due and payable within 30 days from the due date, will lead to termination. We may cancel this mandate and pay via other methods within the 30 days. If we cancel this mandate, we remain responsible to pay any amounts due to Momentum while it was in force. Name and surname Designation Name and surname Designation **Authorised signatories Dates** Company stamp

3: Terms and conditions

- We understand that Multiply is offered by Momentum Multiply (Pty) Ltd, which is a separate entity from Momentum Medical Scheme. Consequently, any Multiply contributions do not form part of the contributions paid to Momentum Medical Scheme.
- 2. We understand that HealthSaver and AdviceFee are offered by Momentum which is a separate entity from Momentum Medical Scheme. Consequently, any HealthSaver and AdviceFee amounts do not form part of the contributions paid to Momentum Medical Scheme.

Name and surname		
Designation		
Name and surname		
Designation		
Authorised signatories		
Dates	D D M M Y Y Y Y	D D M M Y Y Y Y

GapCover

Take care of medical practitioner shortfalls and co-payments for in-hospital procedures through Momentum GapCover. Momentum GapCover is underwritten by Guardrisk Insurance Company Limited, a wholly owned subsidiary of Momentum Metropolitan Holdings Limited. To apply, please speak to your financial adviser

Momentum 268 West Avenue Centurion 0157 PO Box 7400 Centurion 0046 South Africa Call Centre 0860 11 78 59 member@momentumhealth.co.za momentummedicalscheme.co.za Momentum is part of Momentum Metropolitan Life Limited, an authorised financial services and registered credit provider. Reg. No. 1904/002186/06



Contact us on: 0860 100 404, P.O. Box 78367, Sandton, 2146, www.aon.co.za

FSP number: 20555; CMS number: ORG895
Follow our <u>website link</u> for further information on Aon's processing of your personal information

Acknowledgement of appointment

I acknowledge and apposcheme membership.	int Aon South Africa (Pty) Ltd as my financial a	dvisor for all matters re	lated to my medical
My ID:	and membership num	ber:	
contribution, is 3% of th	d that the commission due to Aon, payable by the contribution to a maximum amount payable (tion 65 of the Medical Schemes Act, 131 of 199	(as disclosed on the Bro	okers Statutory Notice) to
Signed at (Town or City)		on yy/m	m/dd:
Signature:			
	e certain information available to A	on South Africa (F	Pty) Ltd
Г	sclosure of information about me.		
Membership number:			
ID or passport number: Title: Initials:	Surname:		
First name(s) (as per ide			
The following information	n should be made available to my appointed fir	nancial advisor as is nec	cessary:
Personal examples	Benefit examples	Financial examples	Medical examples
Name and Surname Membership number Date of birth ID number Postal Address Physical address E-mail Address Telephone numbers Cellular Number Number of dependents	Plan type Medical Savings Account (MSA) Balance Medical Scheme benefits Spent for the year Accumulated Medical scheme Savings Account Medical Savings Carry over from previous year MSA reimbursement, Scheme Rate or Cost Self-payment Gap Above Threshold Benefit Waiting period details Late joiner penalty indicator Wellness benefits	Total contribution Contribution breakdown	Chronic Indicator/ confirmation (Yes/No) In Hospital Indicator/ confirmation (Yes/No) Confirmation of claims paid and from what benefit Claims transaction history Procedures done in doctor's rooms paid from Hospital Benefit
the benefits of appointing	ment, you confirm that you have read and und g Aon document. This letter of appointment wi specific instruction in writing to terminate the	III be valid for the durati	
Signed at (Town or City)		on yy/m	m/dd:



Benefits of appointing

Aon South Africa Healthcare as your intermediary

Aon Healthcare is committed to providing you with exceptional service at every interaction. We have a team of professional, fully accredited advisors to assist you with all your medical schemes, Gap cover and Primary care enquiries.

Our philosophy is to:



Guide:

our members in selecting the medical scheme, Gap cover insurance or Primary care options aligned to their needs.



Educate:

our members with ongoing training throughout the year, end of year medical schemes and Gap cover benefits and rate changes.



Protect:

the rights of members by applying the Medical Scheme Act and scheme rules when resolving disputes with the medical schemes on behalf of the members.

Catalogue of services and technological platform accessible to our members

- Microsites: Provides you with access to voice recorded Induction, Year-end renewal, Year-end launch highlight presentations, brochures, COVID-19 updates, various application forms.
- **Aon Resolution Centre:** Professional assistance with your Medical scheme, Gap cover or Primary care claim resolution, comparison or benefit explanation.
- **Year-end renewal** communications: Access to member letters providing updates on the following:
 - Flash Alert Provides high level summary of benefits and rates changes launched by medical scheme, Gap cover insurance as well as Primary care providers.

- Member letter Provides comprehensive information in relation to the benefits and rates changes implemented by Medical scheme, Gap cover or Primary care provider.
- Guidance letter Aon generates guidance letters for members that are under or over insured. The purpose of the guidance letter is to guide a member on selecting an appropriate option aligned to his/her needs.
- **Ad-Hoc Alerts:**
 - Ad-hoc updates pertaining to Medical schemes industry or providers specific updates.

Cost of appointing Aon

We are pleased to inform you that there is no additional fee charged by Aon when you appoint Aon Healthcare as your Healthcare intermediary. Aon earns monthly commission which is already included in the monthly contribution you pay over to the medical scheme. Monthly commission is part of your total monthly contributions paid to the scheme whether you have appointed Aon as broker or not. This monthly commission is 3% of the contribution to a maximum amount payable (as disclosed on the Brokers Statutory Notice) to brokers in terms of Section 65 of the Medical Schemes Act, 131 of 1998, plus value added tax (VAT). In terms of Primary Care Insurance products we earn maximum 3%. Gap Cover Insurance products, we earn commission on a sliding scale from $5\,\%$ up to $20\,\%$ depending on policy holder's monthly contributions.

Connect with us

We focus on communication and engagement, across insurance retirement and health, to advise and deliver solutions that create great client impact. We partner with our client and seek solutions for their most important people and HR challenges. We have an established presence on social media to engage with our audiences on all matters related to risk and people.

For more information from Aon Employee Benefits on healthcare, retirement benefits and a wide range of topics feel free to go to www.aon.co.za

http://www.facebook.com/Aonhealthcare Click "Like" on our page (Aon healthcare)



http://twitter.com/Aon_SouthAfrica Click "follow" on our profile

Aon Employee Benefits - Healthcare

Aon South Africa Pty Ltd, an Authorised Financial Service Provider, FSP # 20555.

http://www.aon.co.za/disclaimer On all services provided, Aon's Terms & Conditions of Business, as amended from time to time, are applicable and can be

http://www.aon.co.za/terms-of-trade or will be sent to you upon request.

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Disclaimer:

The Benefits and contributions are subject to approval by the council for medical schemes. Although care is taken to represent the rates and benefits correctly, errors and omissions could occur. In case of any conflict, the rules of the affected medical scheme prevail. Any decisions regarding your medical scheme portfolio should be made in conjunction with your Aon Employee Benefits consultant or manager. While Aon has taken reasonable steps to ensure that the information contained in this report is relevant, accurate and current, no warranties of any kind, whether express or implied, including but not limited to the accuracy, completeness, relevance or fitness for a particular purpose are given and Aon expressly disclaims any liability for any loss or damage that may arise from the use of this report. This report is confidential and intended solely for the use of the individual or entity to whom it is addressed. If you received this report in error, you should not disseminate, distribute or copy this report and you should notify Aon if you are not the intended recipient and destroy the report. The report is copyright of Aon SA (Pty) Ltd. You may not, except with our express written permission, distribute or commercially exploit the report. Aon hereby authorizes you to copy the report for non-commercial use within your organization only.

POPIA

Protection of Personal Information Act 4 of 2013 (POPIA), Medical Schemes are requesting a signed Broker Appointment letter to make certain information available to Aon South Africa (Pty) Ltd.

16 May 2022 | V1 | DD