

APPLICATION FOR A BROKERAGE CONTRACT TO ACT AS INTERMEDIARY

1. OFFICE USE O	NLY													
FG number														
FG														
Consultant														
2. IMPORTANT N	NOTES													
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3. PARTICULARS	S OF BROKE	ERAGE												
Type of business														
Company	Close	e Corporation	Sole Prop	rietor	Partnership									
Registered name o	f business													
Registration number	er (if applicat	ole)												
Physical address			Pc	stal address										
		Code				Code								
Nature of business														
3A. BROKERAGI	E PRINCIPAL	L												
Title	Initials	Surname												
Full name/s														
ID or passport numb	per		Date of bi	rth	Ge	ender								
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Fedgroup Asset Management Pty Ltd (Reg. No. 1997/007878/07) Auth FSP. 665, License 13B: No. 24/536 Fedgroup Life Ltd (Reg. No. 2007/018003/06) Auth FSP. 40607 Fedgroup Employee Benefits Pty Ltd (Reg. No. 2008/018532/07) License 13B: No. 24/493 Fedgroup Trust Administrators Pty Ltd (Reg. No. 1951/003389/07) Auth FSP. 16302, License 13B: No. 24/505

Designation

Fedgroup Participation Bond Managers Pty Ltd (Reg. No. 1956/001143/07) CIS 804 Fedgroup Financial Services Pty Ltd (Reg. No. 2012/000697/07) Auth FSP. 45563 Fedgroup Fund Administrators Pty Ltd (Reg. No. 1990/002515/07) Auth FSP. 45563 FSP: 26/10/6690

Initial



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7. BANKING DETAILS (FOR COMMISSION PAYMENTS)

Type of account		
Current	Savings	Transmission
Commission remitta	ance/statement to be	emailed to, if different to contact person

8. AUTHORISATION AND DECLARTION (ON BEHALF OF THE BROKERAGE)

- 1. The brokerage authorises Fedgroup to obtain information from third parties to ascertain the brokerage's fit and proper status, also of its key individuals and representatives.
- 2. It is acknowledged that the brokerage is not authorised to canvass business for Fedgroup until such time that the brokerage has received an approval to act as Fedgroup intermediary letter. Should the brokerage canvass any business prematurely, Fedgroup will at its own discretion decide whether or not the brokerage should receive payment for such business.
- 3. It is agreed that, should Fedgroup enter into a brokerage contract with the brokerage, this application will form part of such contract.
- 4. It is declared and agreed that the agreement shall be dealt with in terms of the contract with regards to any suspension or termination, should any of the following occur:
 - Any of the information provided on behalf of the brokerage to Fedgroup Financial Services is incorrect and/or incomplete
 - Fedgroup enters into a brokerage contract with the brokerage and the brokerage subsequently neglects, or fails to inform and provide Fedgroup with full details under the following circumstances:
 - An additional financial planner is appointed by the brokerage
 - A financial planner terminates his or her services with the brokerage
 - There are changes with regards to the business or the board, members and/or shareholders pertaining to the brokerage
 - The brokerage's business address changes
 - The brokerage's financial services provider licence is suspended and/or not renewed
 - Any changes that occur to any of the brokerage's key individuals and representatives
- 5. I agree that my contractual relationship with Fedgroup Employee Benefits will be subject to South African law and regulation (including but not limited to Financial Intelligence Control Act, Exchange Control and tax requirements.

BROKERAGE PRINCIPAL/DIRECTOR/SHAREHOLDER/KEY INDIVIDUAL

Name and surname		
in my capacity as		
at		(place)
Brokerage principal/sole proprietor signature		Date
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Or		
Key individual signature		Date
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Or		
Director/shareholder		Date Initial
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10. SHAREHOLDERS

Information Required

A list of shareholders who hold 25% or more of the company's shares and the percentage of shares held by each such shareholder.

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Verification (provide certified copies of the documents listed)

Share certificates or a share register in respect of shareholders holding 25% or more of the shares or voting rights in the client.

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11. SHAREHOLDERS

Information Required

Please provide the following information where applicable - where the above-listed shareholder is:

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11F. DECLARATION

We confirm that the above information is true and correct to the best of our knowledge and belief, and enclose copies of the requested verification documentation.

POPI DECLARATION

- 1. I/We acknowledge that any personal information supplied to Fedgroup is provided voluntarily and that Fedgroup may not be able to comply with its obligations if the correct personal information is not supplied.
- 2. I/We understand that privacy is important to Fedgroup and that they will use reasonable efforts in order to ensure that any personal information in their possession or processed on their behalf is kept confidential, stored in a secure manner and processed in terms of South African law and or applicable Data Protection Legislation, for the purposes I have authorised.
- 3. I/We warrant that all information, including personal information, supplied to Fedgroup is accurate and current and agree to correct and update such information when necessary.
- 4. By submitting any personal information to Fedgroup in any form, I/we acknowledge that such conduct constitutes a reasonable unconditional, specific and voluntary consent to the processing of such personal information by Fedgroup with third parties or suppliers for purposes of fulfilling its obligations and other legitimate purposes
- 5. Personal information may be retained by Fedgroup and for as long as it is necessary to fulfil its obligations as set out in this contract or policy, unless:
 - retention of the record is required or authorised by law; or
 - I/we have consented to the retention of the record.
- 6. I/We hereby authorise Fedgroup to collect and process personal information provided and conduct background screening checks including, but not limited to, fraud prevention or detection, ID verification and bank account verification.
- 7. Personal information may be transferred cross-border to countries, which do not necessarily have data-protection laws similar to South Africa, for verification or storage purposes. In any cross-border transfer of personal information the recipient will be notified of the need to protect the confidentiality of the personal information.
- 8. I/We take note that if Fedgroup has utilised the personal information contrary to the privacy and information protection conditions, I/we may first resolve any concerns with Fedgroup. If I/we am/are not satisfied with such process, I/we have the right to lodge a complaint with the Information Regulator.
- 9. A copy of personal information held by Fedgroup will be furnished to me/us upon request in terms of the provisions of the Protection of Personal information Act (POPIA) or Promotion of Access to Personal information Act (PAIA) and I understand that I/we may dispute any information in the record provided.
- 10. I/We unconditionally agree to indemnify Fedgroup and its suppliers, acting in good faith in taking reasonable steps to process my personal information lawfully, against any liability that may result from the processing of any personal information provided by me/us. This includes unintentional disclosures of such personal information to, or access by unauthorized persons, and/or any reliance which may inadvertently be placed on inaccurate, misleading, or outdated personal information, provided to Fedgroup by myself or by a third party on my/our behalf.

Keep me updated about your products and services YN	
AUTHORISED PERSON'S SIGNATURE	
Signed (authorised signatory who warrants his/her authority) on behalf of	
DD MM YYYY	Initial

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