



Government Gazette Staatskoerant

REPUBLIC OF SOUTH AFRICA
REPUBLIEK VAN SUID-AFRIKA

Vol. 452

Pretoria, 18 February 2003
Februarie 2003

No. 24422

MANUAL

IN ACCORDANCE WITH

**THE PROMOTION OF ACCESS TO
INFORMATION ACT (NO. 2 OF 2000)**



AIDS HELPLINE: 0800-0123-22 Prevention is the cure

INDEX

Company Name	Gazette No.	Date	Page No.
Momentum Group Limited	24422	18-2-2003	3

MOMENTUM GROUP LIMITED

Including its division FNB Life and subsidiaries Momentum Wealth (Pty) Ltd,
Momentum Multimangers (Pty) Ltd, Momentum Employee Benefits (Pty) Ltd and
Momentum Unit Trust Management Company (Pty) Ltd ("collectively Momentum")

Postal Address : P O BOX 7400
PRETORIA
0046

Street Address : 268 WEST AVENUE
CENTURION
0157

Telephone : 012 – 671 8911

Facsimile : 012 – 671 8209/10

**Head of
Momentum** : Mr Hillie Meyer

E-mail address : Hmeyer@momentum.co.za

**Deputy
Information
Officer** : Mr Solly Keetse

E-mail address : SKeetse@momentum.co.za

INFORMATION MANUAL

Prepared in terms of Section 51 of

**The Promotion of Access to Information Act 2 of 2000
for assistance in requesting information from:**

Momentum Group Limited

List of subjects and categories of records, which you could have, access to:**A. PRODUCTS AND SERVICES****▪ RISK PRODUCTS****A. Pure Risk**

- Term Insurance
- Diverso
- Survivor Plan
- Home Loan Protection Plan
- Micro/Easy Loan Protection Plan
- Outstanding Balance Insurance
- Customer Credit Protection Plans

B. Prefunded Risk

- Whole Life
- Crescendo

C. Extra Benefits

- Dread Disease Cover
- Disability Cover
- Accident Benefit
- Future Cover Benefit
- Premium Waiver
-

▪ INVESTMENT PRODUCTS**A. Investo**

- Investment Plan
- Education Provider
- 3-D Gearing Plan
- Retirement Annuity
- Preservation Plans
- Personal Offshore Portfolio
- MediFunder

B. Wealth Series

- Flexible Investment Option
- Offshore Investment Option
- Offshore Endowment Option
- Retirement Annuity Option
- Retirement Preservation Option
- Retirement Income Option

C. Traditional Range

- Annuities
- Capital Protector

B. COMPANY RECORDS**▪ FINANCE**

- Financial Statements

▪ ACTUARIAL

- Statutory Returns i.t.o Long Term Insurance Act
- Statutory Actuary Valuations

▪ CLIENT CARE

- Policy Documents
- Applications
- Amendments
- Financial Transactions
- Alterations
- General Information

▪ ALTERNATE

- Company Secretarial Records
- Operational records
- Databases
- Information Technology
- Marketing records
- Internal Correspondence
- Product records
- Statutory records
- Internal Policies and Procedures
- Treasury-related records
- Securities and Equities
- Records held by officials of Momentum

These records include, but are not limited to, the records which pertain to Momentum's own affairs

C. OTHER RECORDS**▪ Shareholders****▪ Directors****▪ Employees**

- **Officials**
- **Consultants**
- **Intermediaries**
- **Service Providers**

RECORDS HELD IN RESPECT OF THE ABOVE-MENTIONED SUBJECTS

- **CONFIDENTIAL**

- Minutes of Meetings
- Trade secrets
- Commercial Research

- **PERSONNEL**

- Personal records provided by personnel
- Records provided by a third party relating to personnel
- Conditions of employment and other personnel related contractual and quasi-legal records
- Correspondence relating to personnel
- Training schedules and material

“Personnel” refers to any person who works for, or provides services to or on behalf of Momentum, and receives or is entitled to receive remuneration and any other person who assists in carrying out or conducting the business of Momentum. This includes, without limitation, directors (executive and non-executive), all permanent, temporary and part-time staff, as well as contract workers.

- **COMMERCIAL**

- Product Brochures
- Application Forms
- Investor Guides

- **GROUP/ COMPANY INCORPORATION**

- Shareholders
- Board Members
- Directors
- Cash Builder Special Offer

D. Structured Products

- Global Geared Growth
- US\$ Guarantee
- Guaranteed Endowment
- Guernsey Offshore products

E. FNB Insurance

- Education Savings
- Contractual Savings
- Retirement Annuity

▪ BUSINESS INSURANCE

- 3-D Gearing Plan
- Bank 3-D Gearing Plan
- Deferred Compensation
- Preferred Compensation
- Business Loan Account
- Buy & Sell Insurance
- Contingent Liability Insurance
- Key-person Insurance
- Retirement Builder

▪ SAVINGS PRODUCTS

- Endowments
- Sinking-Fund policies

▪ MOMENTUM UNIT TRUST PRODUCTS

- Moderate Equity Fund of Funds
- Aggressive Prudential Fund of Funds
- Balanced Prudential Fund of Funds
- Balanced Income Fund of Funds

▪ RETIREMENT PRODUCTS

- Pension Preservation Option
- Provident Preservation Option
- Retirement Income Option
- Normal Annuities
- Key Feature Documents i.r.o the above

▪ PENSION FUND ADMINISTRATION BUSINESS

- Member Benefit administrated by Momentum Group Ltd
- Investment Management by Momentum Advisory Service
- Retirement Funds

**NOTE: Access to certain records may be denied on the grounds set out
in the Promotion of Access to Information Act 2 of 2000**

Printed by and obtainable from the Government Printer, Bosman Street, Private Bag X85, Pretoria, 0001
Publications: Tel: (012) 334-4508, 334-4509, 334-4510
Advertisements: Tel: (012) 334-4673, 334-4674, 334-4504
Subscriptions: Tel: (012) 334-4735, 334-4736, 334-4737
Cape Town Branch: Tel: (021) 465-7531

Gedruk deur en verkrygbaar by die Staatsdrukker, Bosmanstraat, Privaatsak X85, Pretoria, 0001
Publikasies: Tel: (012) 334-4508, 334-4509, 334-4510
Advertensies: Tel: (012) 334-4673, 334-4674, 334-4504
Subskripsies: Tel: (012) 334-4735, 334-4736, 334-4737
Kaapstad-tak: Tel: (021) 465-7531