

## **INTERMEDIARY DISCLOSURE UNDER THE POLICY PROTECTION RULES**

To My Valued Clients,

My name is **Wesley Birch**, a member of **Goudvis & Associates Cc**.  
Known as **Wesley**.

**Postal address:**

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**Physical address:**

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Silver Lakes, Pretoria  
0054  
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I am contracted to Sam Goudvis & associates cc an authorised Independent Financial Service Provider operating under FSCA License no: 4750 and have been in the insurance and assurance industry for 15+ years.

A copy of the licenses can be made available for inspection on request.

**I have experience in providing the following services:**

- Capital needs analysis on Death and Disability
- Short Term Insurance (Commercial & Individual)
- Investment Planning (Local and Overseas)
- Health Care Planning (Medical aids, Severe illness, etc)
- Estate Planning
- Wills and Trusts
- Group Schemes (Pension and Provident Funds)
- Corporate Assurance (Buy & Sell, Key man etc)

**I have the following qualifications:**

- National Certificate in Wealth management
- Regulatory examination 1
- Regulatory examination 5

I have a contractual relationship and I am authorised to sell the products from the following assurers and insurers:

<b>Old Mutual Life</b>	<b>Momentum Wealth</b>	<b>Discovery Health</b>	<b>Auto &amp; General</b>
<b>Momentum Life</b>	<b>Old Mutual Wealth</b>	<b>Momentum Health</b>	<b>Mutual &amp; Federal</b>
<b>Discovery Life</b>	<b>Discovery Invest</b>	<b>ProfMed</b>	<b>Discovery Short Term</b>
<b>Liberty Life</b>	<b>Allan Gray</b>	<b>MediHelp</b>	<b>Hollard</b>
<b>Sanlam</b>	<b>Allan Gray International</b>	<b>BestMed</b>	<b>Momentum Short Term</b>
<b>FMI</b>	<b>Allan Gray Australia</b>	<b>Fedhealth</b>	<b>Santam</b>
<b>Metropolitan</b>	<b>Nedgroup Investments</b>	<b>Health Squared</b>	<b>Bryte</b>
<b>BrightRock</b>	<b>Itransact</b>	<b>Sirago Gap cover</b>	

Hollard Life	Old Mutual Guernsey	Cura Gap cover	One Insure
Medihelp	Discovery Health	Bestmed	Health Squared
Fedhealth	Bonitas	Compcare	Momentum Health

We have the following Corporate groups as our clients:

**Land Bank of South Africa**  
**Embassy of Sweden**  
**Compharm**  
**Grafters Tavern**  
**Impeco**  
**Fatton Ariva South Africa**  
**Von Stade Design**  
**Bossana Group**  
**Mpisi group**  
**Kjaer Group**

- Compliance with the FAIS Act is monitored by Masthead (Pty) Ltd, a compliance practice approved by the FSCA. Their postal address: PO Box 856, Howard Place, 7450.
  - Remember that you may contact either the Long-term Insurance Ombudsman or the Registrar of Long-term Insurance, whose details are set out below, if you have any concerns regarding a product sold to you or advice given to you. **Particulars of the Long-term Insurance Ombudsman:** PO Box 45007, CLAREMONT, 7735, Tel: (021) 657 5000, [info@ombuds.co.za](mailto:info@ombuds.co.za).
  - Particulars of the Registrar of Long-term Insurance:** Financial Sector Conduct Authority PO Box 35655, MENLO PARK, 0102, contact center 0800 203 722 Tel: (012) 428-8000 , [info@fsc.co.za](mailto:info@fsc.co.za)
- I may from time to time receive non-cash incentives from product suppliers or indirect consideration from other persons. We do keep a register should you request further information.
  - I wish to advise that all information obtained acquired about you shall remain confidential unless you provide written consent, or unless I am required by any law to disclose such information.
  - In the event that you are dissatisfied with any aspect of my service, you should address your complaint in writing to me at the above address. A copy of my Complaints Resolution Policy is available on request.
  - I am also a member of the Independent Broker Council of South Africa.
  - I do not directly or indirectly hold more than 10% of an assurer or insurer's shares.
  - I did not receive more than 30% remuneration from any one insurer in the last year.
  - I am not an associated company of any of the above assurers or insurers.
  - I am being reimbursed for my services by being paid a commission.
  - I hold R3 000 000 professional indemnity insurance.
  - We share certain of your information with third party companies which are vital to our business processes. Your information is always treated as confidential and only shared with third party companies vital to our Business processes. For more information please do not hesitate to contact us.

## Products Approved

Category Description	Advice	Intermediary
CATEGORY I		
Long-Term Insurance subcategory A	X	X
Short-Term Insurance Personal Lines	X	X
Long-Term Insurance subcategory B1	X	X
Long-term insurance subcategory B2	X	X
Long-term Insurance subcategory B2-A	X	X
Long-term Insurance subcategory B1-A	X	X
Short-term Insurance Personal Lines A1	X	X
Long-Term Insurance subcategory C	X	X
Retail Pension Benefits	X	X
Short-Term Insurance Commercial Lines	X	X
Pension Funds Benefits	X	X
Participatory interests in a collective investment scheme	X	X
Health Service Benefits	X	X

**26 January 2022**

DATE

FINANCIAL ADVISER'S SIGNATURE