



This document serves as confirmation of the personal & business particulars of

## MARCUS JACOBS

a Representative of Accredinet Financial Solutions (Pty) Ltd

Reg. no.: 1999/010904/07

as required by the FAIS Act.

FSP License No. FSP 8933

### PERSONAL PARTICULARS OF THE FINANCIAL ADVISOR

<b>Physical Address:</b> 9 Hoyt Crescent Moreleta Park 0167	<b>Postal Address:</b> PO Box 100 315 Moreleta Plaza 0167	<b>Contact Details:</b> Tel no: 012 998 9438 Fax no: 086 425 6213 Cell no: 082 788 0909 E-mail: marcus@mjffins.co.za
<b>LEGAL STATUS</b>	Contracted Representative	
<b>QUALIFICATIONS</b>	NC: Financial Planning (NQF 6); 1 <sup>st</sup> Level Regulatory Exam: Representatives	
<b>EXPERIENCE</b>	Experience in the Financial Services Industry: Since 1998 Work related experience - Financial Advisor: Since 1998	
<b>HOLDER OF PROFESSIONAL INDEMNITY INSURANCE</b>	YES	

### PRODUCT CATEGORIES

The Financial Advisor is authorized to provide advice and intermediary services on the following Category I Product Categories:

- Long-term Category A, B1, B2 & C
- Retail Pension & Pension Fund Benefits
- Health Service Benefits
- Collective Investment Schemes
- Short-Term Insurance : Personal & Commercial Lines
- Securities and Instruments : Shares & Debentures and securitised debt

### MANDATE

The Financial Advisor is mandated via Accredinet Financial Solutions (Pty) Ltd to act as intermediary on behalf of the following Companies:  
(Please note that the contact details of the relevant underwriter as well as the applicable office of the Ombudsman will be disclosed on the correspondence of the underwriter.)

#### LONG-TERM INSURANCE & INVESTMENTS

- DISCOVERY
- LIBERTY
- OLD MUTUAL
- PPS
- HOLLARD
- MOMENTUM
- SANLAM
- BRIGHTROCK

#### HEALTH SERVICE BENEFITS

- DISCOVERY HEALTH
- BESTMED
- FEDHEALTH
- BONITAS
- RESOLUTION HEALTH
- MEDIHELP
- PROFMED
- MOMENTUM MEDICAL SCHEME ADMINISTRATORS

#### SHORT-TERM INSURANCE

- MOMENTUM
- SANTAM
- DISCOVERY INSURE
- LEGACY
- STRATUM BENEFITS
- KING PRICE

Did/Did not earn > 30% of total commission for the previous year from a specific Insurer/Product Provider.

Do not own > 10% of issued shares directly/indirectly in any Insurer/Product Provider and are not an associated company of any Insurer/Product Provider.

The intermediary's mandate specifically provides that the intermediary may only represent Accredinet Financial Solutions (Pty) Ltd as financial service provider in respect of such products of the abovementioned financial product suppliers as the intermediary is authorized to provide advice and intermediary services.

Accredinet Financial Solutions (Pty) Ltd, as financial service provider, accepts responsibility for the intermediary's performance within the scope of or in the course of implementing any action authorized by the intermediary's mandate.

<b>CONFLICT OF INTEREST</b>	This FSP has implemented a Conflict of Interest Management Policy. The FSP might on occasion receive gifts/prizes from Service Providers, the details of which are contained in the Gifts Register and is available for your perusal.
<b>TREATING CUSTOMERS FAIRLY</b>	This FSP has embedded the 'Treating Customers Fairly' requirements onto the culture of the organization and it is supported by various policies and procedures.
<b>REMUNERATION</b>	Commission and fees will be disclosed by the Financial Advisor.
<b>COMPLAINTS</b>	Kindly direct all complaints in writing to the Compliance Officer: Germa Beukes on fax 086 691 5253 or germa@tenfour.co.za
<b>CLAIMS NOTIFICATION PROCEDURE</b>	In the event of a claim, please first contact the Financial Advisor to assist you with submitting a claim. You may also contact the Insurance Company directly.

<b>Long Term Insurance OMBUDSMAN:</b> Private Bag X45, CLAREMONT, 7735 Tel: 021 657 5000 Fax: 021 674 0951 www.ombud.co.za	<b>FAIS OMBUDSMAN:</b> PO Box 74571, LYNNWOOD RIDGE, 0040 Tel: 012 470 9080 Fax: 012 348 3447 www.faisombud.co.za	<b>FSB:</b> PO Box 35655, MENLOPARK, 0102 Tel: 0800 20 20 87 Fax: 0800 11 04 43 www.fsb.co.za
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