



**ACCREDITNET**  
THE EXTRA DIMENSION IN FINANCIAL SERVICES

An Authorised Financial Services Provider **FSP 8933**

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

## JOSEPH MARCUS JACOBS

an Authorised Representative of Accredinet Financial Solutions (Pty) Ltd

as required by the FAIS Act.

Tel: 012 991 9600

www.accredinet.co.za

2<sup>nd</sup> Floor, Block C, Menlyn Corporate Park

175 Corobay Avenue, Pretoria, 0181

P.O Box 73481, Lynnwood Ridge, 0040

Registration no: 1999/010904/07

<b><u>PHYSICAL ADDRESS</u></b> 9 Hoyt Crescent Moreleta Park 0167	<b><u>POSTAL ADDRESS</u></b> PO Box 100 315 Moreleta Plaza 0167	<b><u>CONTACT DETAILS</u></b> Tel no: 012 998 9438 Cell no: 082 788 0909 E-mail: marcus@mjffins.co.za
<b>LEGAL STATUS</b>	Contracted Representative & Accredited Health Care Broker – BR25898	
<b>QUALIFICATIONS &amp; TRAINING</b>	NC: Financial Planning (NQF 6) & Regulatory Exam: Representatives (RE 5)	
<b>EXPERIENCE</b>	Years' experience in the Financial Services Industry: Financial Advisor: Since 1998	
<b><u>FINANCIAL PRODUCTS</u></b>		
The Representative is authorized to provide advice and intermediary services in respect of the following Category I Financial Products:		
<ul style="list-style-type: none"><li>▪ Long-term Category A, B1, B1-A, B2, B2-A &amp; C</li><li>▪ Short-Term Insurance Personal Lines</li><li>▪ Short-Term Insurance Commercial Lines</li></ul>	<ul style="list-style-type: none"><li>▪ Retail Pension Benefits</li><li>▪ Collective Investment Schemes</li><li>▪ Debentures and securitised debt</li></ul>	<ul style="list-style-type: none"><li>▪ Pension Fund Benefits</li><li>▪ Health Service Benefits</li><li>▪ Shares</li></ul>
<b><u>MANDATE</u></b>		
The Representative is mandated via Accredinet Financial Solutions (Pty) Ltd to act as intermediary on behalf of the following Product Providers: <i>(Please note that the contact details of the relevant Product Provider will be disclosed in the correspondence of the Product Provider.)</i>		
<b><u>LONG-TERM INSURANCE &amp; INVESTMENTS</u></b>		
<ul style="list-style-type: none"><li>▪ SANLAM</li><li>▪ MOMENTUM</li></ul>	<ul style="list-style-type: none"><li>▪ BRIGHTROCK</li><li>▪ DISCOVERY</li></ul>	<ul style="list-style-type: none"><li>▪ OLD MUTUAL</li><li>▪ HOLLARD</li><li>▪ NINETY ONE</li><li>▪ LIBERTY</li><li>▪ ALLAN GRAY</li><li>▪ BIDVEST LIFE (FMI)</li><li>▪ AIMS</li><li>▪ FEDGROUP</li></ul>
<b><u>SHORT-TERM INSURANCE</u></b>		
<ul style="list-style-type: none"><li>▪ SANTAM</li><li>▪ DISCOVERY</li><li>▪ FSP SOLUTIONS</li><li>▪ MOMENTUM</li><li>▪ MIRABILLIS</li><li>▪ KING PRICE</li><li>▪ LEGACY</li><li>▪ SHA</li><li>▪ AIC</li></ul>		
<b><u>HEALTH SERVICE BENEFITS</u></b>	<ul style="list-style-type: none"><li>▪ DISCOVERY HEALTH</li><li>▪ MEDIHELP</li><li>▪ BONITAS</li><li>▪ BESTMED</li><li>▪ FEDHEALTH</li><li>▪ MOMENTUM</li></ul>	
<b><u>GAP COVER</u></b>	<ul style="list-style-type: none"><li>▪ SIRAGO</li><li>▪ STRATUM</li><li>▪ CURA</li></ul>	<b><u>WILLS</u></b> <ul style="list-style-type: none"><li>▪ CAPITAL LEGACY</li></ul>

The Representative did not earn > 30% of total commission for the previous 12 months from any Product Provider.

The Representative does not have a substantial financial interest and / or own > 10% of issued shares directly / indirectly in any Product Provider.

The mandate specifically provides that the Representative may only represent Accredinet Financial Solutions (Pty) Ltd as financial service provider in respect of such financial products of the abovementioned Product Providers for which the Representative is authorised to provide advice and intermediary services.

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

Accredinet Financial Solutions (Pty) Ltd is a holder of Professional Indemnity Insurance.

<b>CONFLICT OF INTEREST</b>	This FSP has implemented a Conflict of Interest Management Policy. The FSP might on occasion receive gifts / prizes from Product 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 organisation and it is supported by various policies and procedures.
<b>REMUNERATION</b>	Commission and fees will be disclosed by the Representative.
<b>COMPLAINTS</b>	Kindly direct all complaints in writing to the Compliance Officer: Adriaan van Wyk (CO 6870) – adriaan@horizoncompliance.co.za
<b>CLAIMS NOTIFICATION PROCEDURE</b>	In the event of a claim, please first contact the Representative to assist you with submitting a claim. You may also contact the Insurance Company directly.

**FAIS OMBUDSMAN:** PO Box 74571, LYNNWOOD RIDGE, 0040 • Tel: 012 470 9080 • Fax: 012 348 3447 • www.faisombud.co.za

**FSCA:** PO Box 35655, MENLOPARK, 0102 • Tel: 0800 20 20 87 • Fax: 0800 11 04 43 • www.fsc.co.za

**OMBUDSMAN LONG-TERM INSURANCE:** P/Bag X45, CLAREMONT, 7735 • Tel: 021 657 5000 • Fax: 021 674 0951 • www.ombud.co.za

**OMBUDSMAN SHORT-TERM INSURANCE:** PO Box 32334, BRAAMFONTEIN, 2017 • Tel: 011 726 8900 • www.osti.co.za

**COUNCIL FOR MEDICAL SCHEMES:** P/Bag X34, Hatfield, 0028 • Tel: 0861 123 267 • www.medicalschemes.com

CLIENT SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_