

## 1. INTRODUCTION

Discovery Life Limited, FSP number 18147, hereby certifies that,

is currently employed by Discovery Life Limited and is a licensed representative on our FSP license.

- We accept responsibility for any activities performed within the scope/mandate of, or in the course of implementing any contract or mandate relating to the financial services rendered by the representative.
- We confirm that the representative meets the fit and proper requirements prescribed by the FAIS Act to render financial services.
- Discovery Life Limited holds the necessary Professional Indemnity Cover, and the representative is remunerated on a monthly basis by means of statutory commission, ongoing fees, renewal fees and/or Incentives paid by Discovery Life Limited.
- The representative does not directly or indirectly hold more than 10% of Discovery's shares, nor any equivalent substantial interest in any of the companies or products within the Discovery Group.
- The representative receives more than 30% of his/her total remuneration from Discovery.
- Discovery Life Limited has a Conflict of Interest Management Policy, a copy of which can be made available upon request.

## 2. REPRESENTATIVE | CONTACT DETAILS

Telephone (W)  -  Cellphone  -

E-mail

### Address

#### Business Address

Complex / Unit / House number

Complex Name / Estate

Street Number

Street Name / Name of Farm

Suburb / District

City / Town

Country  Code

## 3. PRODUCT SUPPLIER | COMPANY DETAILS

The representative is authorised to provide financial services on behalf of the following product suppliers:

FSP Number

Contact number

Discovery Life Ltd	18147	0860 005433
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The registered address for the above entities is 1 Discovery Place, Sandhurst, Sandton, 2196.

## 4. PRODUCT CATEGORIES

Product categories	Product name	The representative is licensed to render financial services for the following products:	The representative renders financial services, under supervision, for the following products:
1.22	Sub category B1-A (Discovery Life - Funeral Plans)	<input type="checkbox"/>	<input type="checkbox"/>

## 5. COMPLAINTS

5.1 Should you have any concerns or complaints, you can contact Discovery's Chief Compliance Officer.

Email: [compliance@discovery.co.za](mailto:compliance@discovery.co.za)

5.2 The FAIS Ombud is an independent and impartial dispute solution tribunal which investigates, considers and disposes of complaints by consumers against financial services providers as required by the FAIS Act.

PO Box 74571 | Lynnwood Ridge, | Pretoria, 0040 | Telephone: 012 470 9080 | Fax: 012 348 3447

## 6. Privacy Statement

### 6.1 Definitions

"Personal Information" refers to personal information about you, your spouse, your dependents and your beneficiaries (as relevant). It includes information about health, financial status, gender, age, contact numbers and addresses.

"Discovery" refers to Discovery Limited, Discovery Health (Proprietary) Limited, Discovery Life Limited, Discovery Vitality (Proprietary) Limited, Vitality Health style Travel (Proprietary) Limited, Discovery Insure Limited, Discovery Life Investment Services (Proprietary) Limited, Discovery Life Collective Investments (Proprietary) Limited, Discovery Nominees (Proprietary) Limited and Discovery Retirement Annuity Fund 12/8/37469, Discovery Investment Retirement Annuity Fund 12/8/37787, Discovery Preservation Pension Fund 12/8/37760 and the Discovery Preservation Provident Fund 12/8/3775. These entities will collectively be referred to as "Discovery", and specifically, excludes all Medical Schemes administered by Discovery Health (Proprietary) Limited.

### 6.2 Consent to collect, store and disclose certain information to Discovery

The privacy statement ("statement") explains how Discovery, (we/us) collect, use, disclose, share and otherwise process personal information, in line with the Protection of Personal Information Act.

By consenting to the statement you are giving us permission to process personal information specifically for the purpose of rendering sound and proper financial advice, and any additional information provided by you or us to the duly authorised agent for purposes of:

- Financial needs analysis;
- Quotation and application purposes;
- Obtaining information from the financial services exchange (Astute) or any other financial institution; and
- For administration purposes within the group.
- Upselling and /or cross selling.
- Special Offerings.

## 7. CLIENT DECLARATION

I  confirm that I have read the above notice.

Client Signature

Date  -  -

A copy of this legislated disclosure notice will be made available to you within 30 days from the date of signing this document.

Financial Adviser  
Signature

Date  -  -