



OLD MUTUAL SUPERFUND

EASY BENEFIT PLAN

YOUR STEP-BY-STEP GUIDE FOR REGISTERING WITH SECURE SERVICES VIA THE INTERNET

This guide is specifically designed for the Old Mutual SuperFund Easy Benefit Plan.

It's easy! Simply follow the steps in this guide.

If you have access to Old Mutual Secure Services, please use your existing user number and password to apply for an additional service, by following **Step B** in this registration guide.

If you do not have access to Old Mutual Secure Services, follow **Steps A and B** in this registration guide.

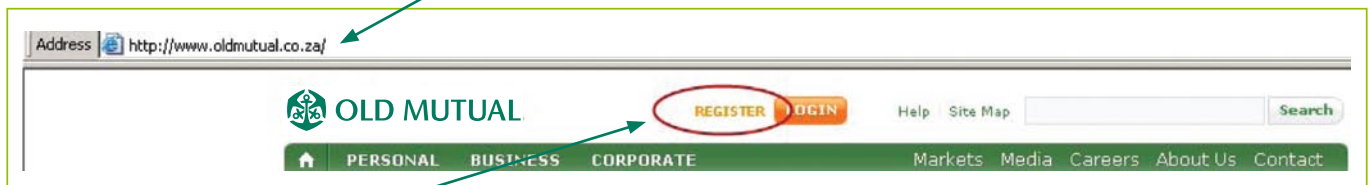
A. REGISTER WITH SECURE SERVICES

Why Old Mutual Secure Services?

Secure Services will ensure that your information gets treated with the highest confidentiality.

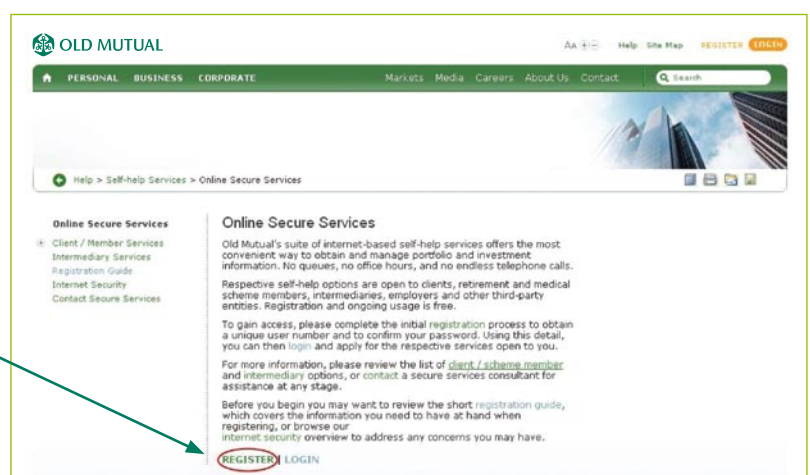
Step A1

Open your Internet browser and type **www.oldmutual.co.za** in the address field.



Step A2

Click on **Register** - top of the web page.
A background page on Secure Services opens.
Click on **Register** again.



7 November 2008 3:31:45 PM (GMT+2)

Login Register Terms & Conditions Help Contact Us

SECURE SERVICES | REGISTER

PERSONAL DETAILS

Please note that fields marked with a "*" are required.

Title:*

Initial(s):*

Name(s):*

Surname:*

Date of birth:*

Daytime telephone number:* (code and number)

Work telephone number: (code and number)

Cellphone number: (number)

ID type:*

ID number:*

Email address:*

Confirm email address:*

I have read and accept the [Legal terms and conditions](#)

ACCESS TO MYPORTFOLIO

MyPortfolio gives you access to detailed and up-to-date information on all your Old Mutual policies and investments via the internet.

I would like to register to view my [Old Mutual portfolio](#)

Cancel Continue

Step A3
 Fill in all your personal details, click on the checkbox and **Continue**. Ensure that you complete all the compulsory fields(*).

29 April 2010 2:51:07 PM (GMT+2)

Login Register Terms & Conditions Help Contact Us

SECURE SERVICES | REGISTER

PASSWORD

Please enter a password:
 Your password must be between 6 and 12 characters long and contain at least one UPPER-CASE letter, one lowercase letter and one number (e.g. Pa55w0rd12).

Password

Confirm Password

SECURITY QUESTIONS

Please select and answer three questions from the choices below:
 This information will be used in future to verify your identity, should you forget your password or wish to change your password online.

Question 1
 Select first question ... Answer 1

Question 2
 Select second question ... Answer 2

Question 3
 Select third question ... Answer 3

USERNAME (OPTIONAL)

Once you have registered successfully, the system will generate an 8-digit username that you can use to log in with. However, you can also choose a friendly name with which to log in, your **username**. You can still log in using your **userid**. Your username is just an easier-to-remember name which you can choose. Remember the following when choosing your username:

- It must contain 6 or more characters
- Special characters (*, @, #, -, etc.) are not allowed
- It is not case-sensitive

Examples: JSmith, JohnSmith, John_S

Please select your username
 Username: [Check availability](#)

Back Cancel Continue

Disclaimer | Directors | Privacy Policy

Step A4
 Choose a **password** and enter it into the required spaces. Complete the registration process by answering three security questions. Choose questions to which you will easily remember the answers, should you ever need to change your password.
 If you are registering for the first time, you have the opportunity to choose your username when choosing your password.
 Click on **Continue**.

Your Username Close

You can choose how you want to log in to Old Mutual Secure Services. You can opt to log in using a username, that you will select. Alternatively you can log in using the system generated 8-digit userid number.

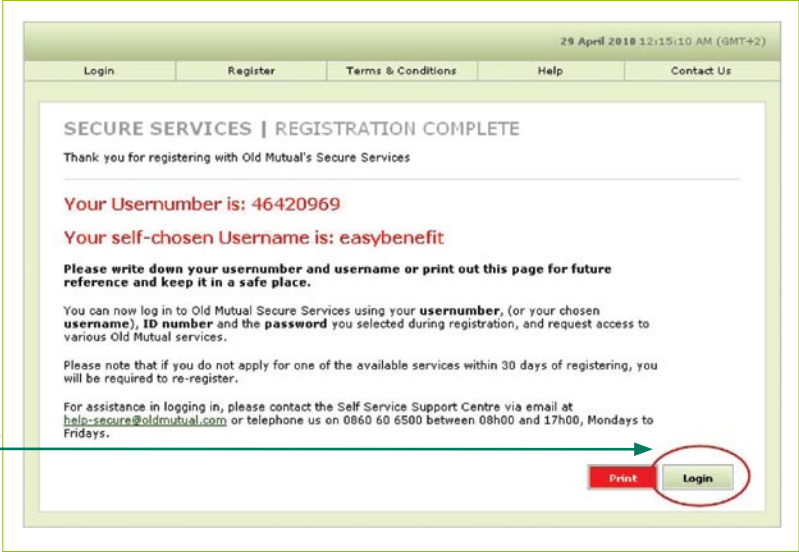
You can also choose your username at a later stage, after registering. Simply log in using your userid number, select **Change Details** and then **Personal Details**. Capture your chosen username in the text box provided.

Remember the following when choosing your username:

- It must contain 6 or more characters.
- Special characters (*, @, #, -, etc.) are not allowed.
- It is NOT case sensitive.
- A system check will ensure that your username does not already exist.

Step A5
 Either print this webpage or write down your user number as you will need this number on the next page and every time that you access Old Mutual Secure Services. Click on **Login**.

You will receive confirmation via e-mail when your registration has been approved.

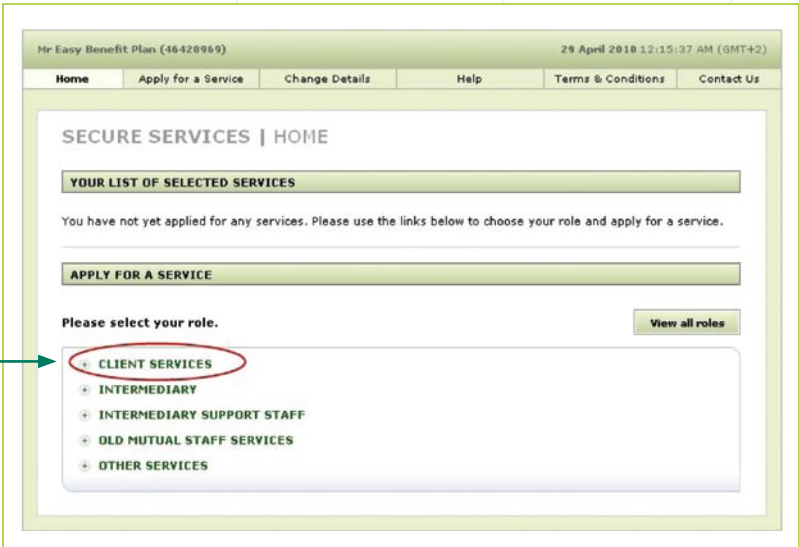


B. APPLY FOR ACCESS TO THE EASY BENEFIT PLAN SERVICE

Step B1
 Fill in your:
 ■ User number
 ■ Identity number
 ■ Password
 Click on **Login**.

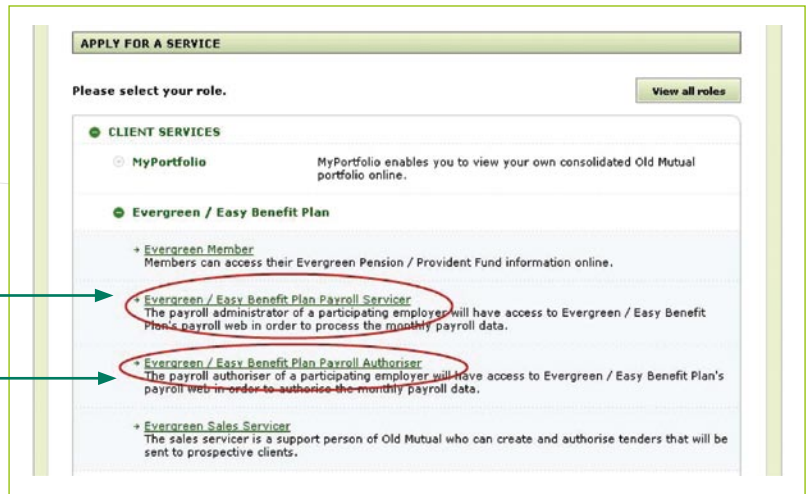


Step B2
 Click on **Client services**.
 A list of services will be displayed.
 Click on **Evergreen/Easy Benefit Plan**.

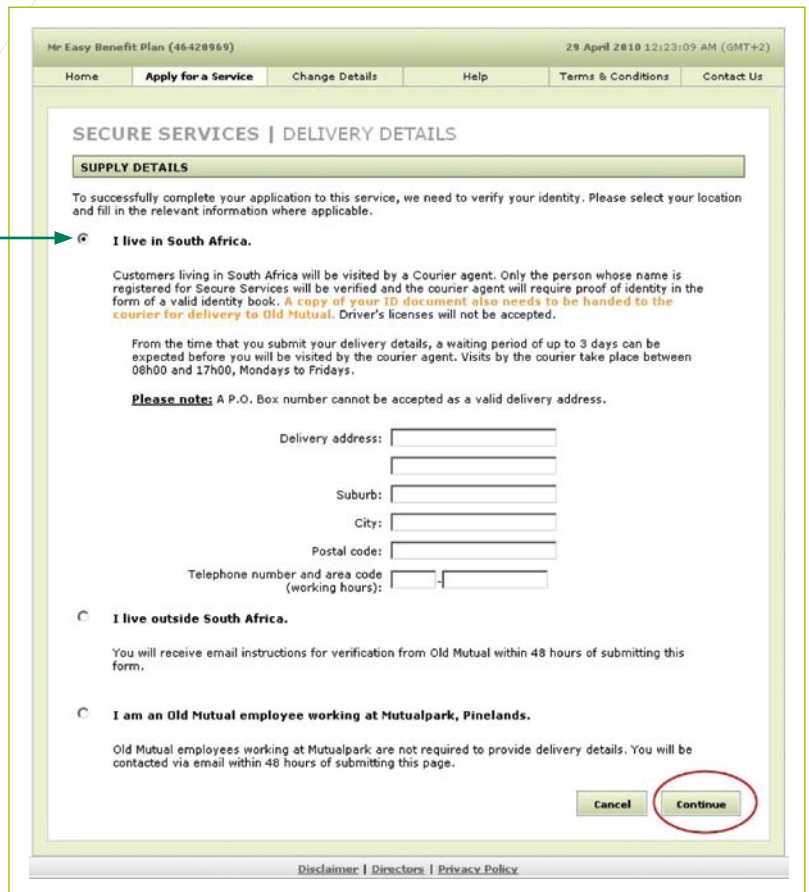


If you need to have more than one role, you need to apply for each of them separately.

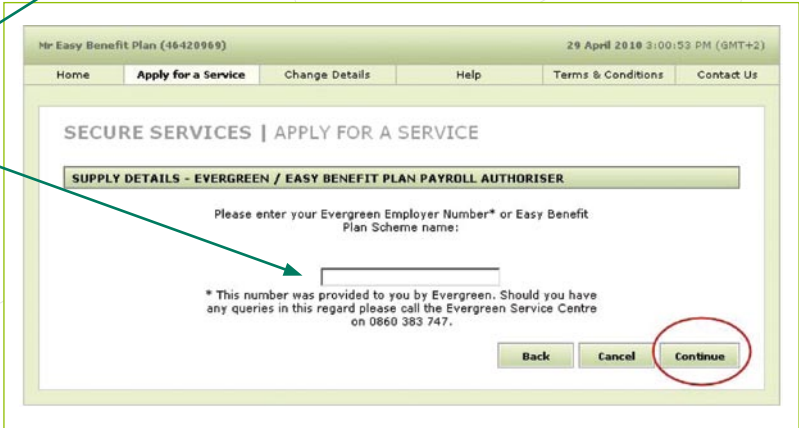
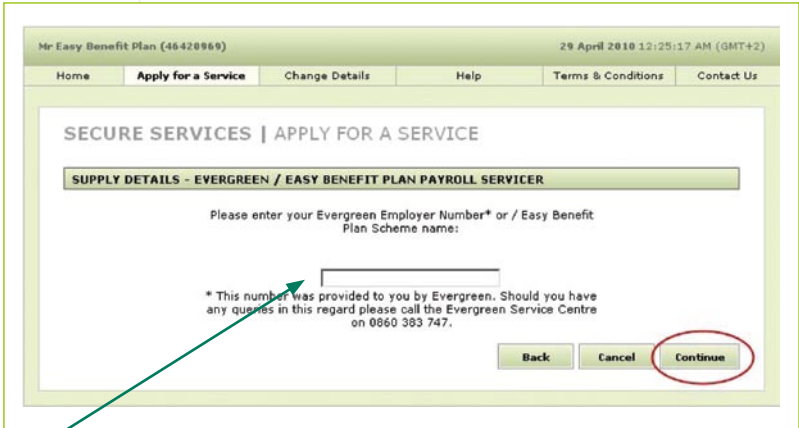
Step B3
 On this screen you have the option to apply for various services.
 If you are required to update scheme data, select **Easy Benefit Plan Payroll Servicer**.
 If you are required to authorise scheme data, select **Easy Benefit Plan Payroll Authoriser**.



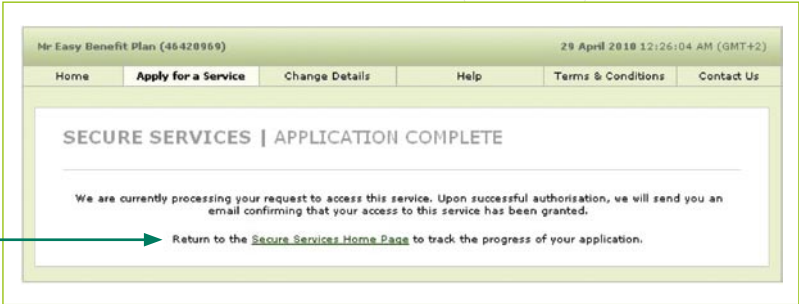
Step B4
 Select the applicable option.
 Be sure to enter the correct physical street address where you can be reached during daytime and click on **Continue**.



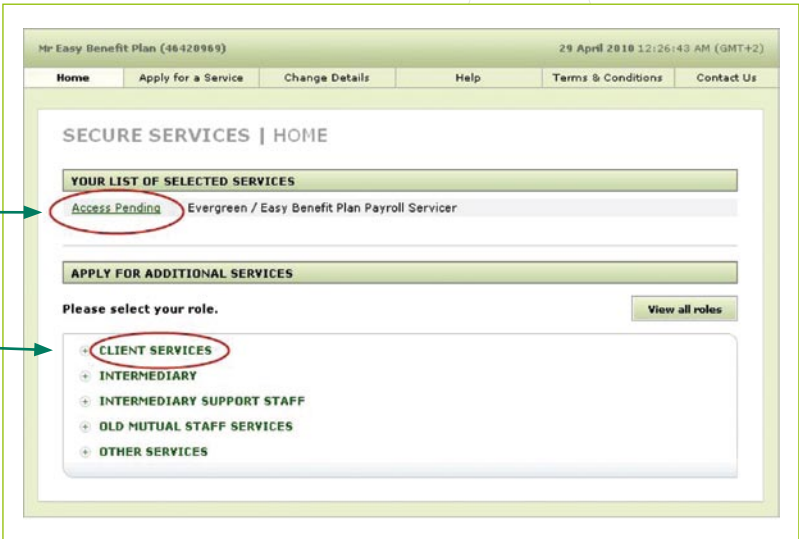
Step B5
 The process is the same if you are applying for the role of Payroll Servicer or Payroll Authoriser. Repeat from step B3. Note that even if the same person is both the Servicer and Authoriser, that person has to register separately for both roles. Fill in your **Company name**. Click on **Continue**.



Step B6
 Click on the **hyperlink** to view the status of the application.



Step B7
 The status of the application will be "Access Pending" until the access is approved. If you need to apply for an **Additional Service**, click on **Client services** and continue the process.



- Access is Pending until the registration process for the Service is completed.
- As part of ensuring your on-line security, your identity needs to be verified in person. Within 3-5 working days (or 7 working days if you are in a rural area) of registering, **you will receive a visit from an agent of a courier company who will request to view your actual RSA Identity Document. As part of this process, you must provide this agent with a copy of your RSA Identity Document.** This will be verified with Old Mutual Secure Services.
- On successful verification, you will receive e-mail confirmation that your access has been granted.
- The access will be changed to Active.
- You will now be able to update or view the scheme data through Secure Services either via the link in the e-mail or via the Internet browser.
- Each time you need to update or view the scheme data, you can access Secure Services via the Internet browser.

