

OLD MUTUAL UNIT TRUSTS IMPROVES SERVICE EXPERIENCE

IN LINE WITH OUR BUSINESS STRATEGY TO FIND WAYS TO IMPROVE YOUR SERVICE EXPERIENCE, WE ARE EMBARKING ON A NEW TELEPHONY SERVICE DELIVERY MODEL.

WHAT DOES THIS MEAN?

Old Mutual Unit Trusts has automated their call flow options to enhance the administration process and also provide an even better customer service experience. From 9 November 2015, you will be required to provide identification details when contacting the Unit Trusts Service Centre on 0860 234 234. Please take note of the new automated options available.

Our Top Investors line 0860 254 254 will be deactivated on 1 December 2015. A message will be played for three weeks to inform callers of the closure and prompting them to call our Service Centre for assistance.

WHAT ARE THE BENEFITS OF THESE CHANGES?

- You only need to remember one contact number for Unit Trusts.
- We can track your queries more effectively.
- It saves you time - no need to repeat your query each time you contact the Service Centre.

WHAT IS THE PROCESS?

ADVISERS

Advisers have to choose the "intermediary" option and then insert their adviser code.

ADVISER SUPPORT STAFF

Support staff calling on behalf of the adviser must also choose the "intermediary" option but then insert their staff codes.

INVESTORS

Investors will be required to insert their ID numbers when they call the Service Centre.

THIRD PARTIES

Third party callers, including executors, beneficiaries, banks and non-contracted advisers, have to choose the option "calling on behalf of an investor" and enter the ID number of the investor they are representing.

PLEASE NOTE:

When new advisers who don't have codes yet phone our system, it will prompt them twice to insert a code after which they will be routed to a service professional.



IMPORTANT INFORMATION

Old Mutual Unit Trust Managers (RF)(Pty)Ltd (OMUT) is a registered manager in terms of the Collective Investment Schemes Control Act 45 of 2002. The fund fees and costs that we charge for managing your investment is accessible on the relevant fund's minimum disclosure document (MDD) or Table of fees and charges, both available on our public website, or from our contact centre. Old Mutual is a member of the Association of Savings & Investment South Africa (ASISA).