



MEET YOUR SENIOR RETIREMENT BENEFITS COUNSELLORS

OLDMUTUAL

CORPORATE RETIREMENT SOLUTIONS

ANNUITY STRATEGY



THAMI MNGUNI



EDWARD BARLOW

YOUR RETIREMENT FUND MANAGEMENT BOARD HAS PARTNERED WITH OLD MUTUAL TO PROVIDE YOU WITH THE FREE SERVICES OF A RETIREMENT BENEFITS COUNSELLOR (RBC). HERE IS WHAT SOME OF OUR CUSTOMERS HAD TO SAY ABOUT THEIR SERVICE.

“

Thami's service was prompt and excellent. She's a true gem to the company. She is so efficient and an absolute pleasure to deal with.

She has been an amazing help with getting my Retirement Fund sorted out and will be remembered with fondness. Old Mutual really deserves an employee like you. So efficient!

”

“

Eddie displayed professionalism and patience rarely seen in the modern corporate world in my numerous interactions with him.

He constantly kept me in the loop, which is a good antidote for unnecessary anxiety and stress. His professional manner and enthusiasm exceeded my expectations, making it a pleasure doing business with Old Mutual. Well done!

”

If your retirement fund is not one of the funds to which the Old Mutual RBC has been appointed, the RBC will not be able to provide you with the information below. Instead, you will need to liaise with your retirement fund for information about your retirement options.

WHAT CAN YOUR RBC DO FOR YOU?

1. Outline your retirement options
2. Explain how annuities work to give you a retirement income (pension)
3. Describe the different kinds of annuities, so you can choose the best one for you
4. Discuss the tax implications on your cash portion
5. Provide quotes on your annuity options so you can see what your retirement income could be
6. Help you fill in the annuity application forms
7. Put you in contact with an Old Mutual financial adviser if you want advice and don't have your own financial adviser*

*RBCs are not financial advisers and therefore will not give you financial advice. They also do not earn any commission for the guidance or information they give you. If you use the services of a financial adviser, you may be charged for his or her services.

TAKE THE FOLLOWING STEPS TODAY:

Contact an Old Mutual RBC on either 021 503 0069 or omannuitystrategy@oldmutual.com