



# BASIC DIFFERENCES BETWEEN AN EXIT BENEFIT COUNSELLOR AND A FINANCIAL ADVISER

OLDMUTUAL

CORPORATE

SUPERFUND

## Exit Benefit Counsellor (EBC)\*

## Financial Adviser

### What is offered to you

Information and guidance on the options available when you leave your employer

Recommendations of the appropriate solutions that suit your personal financial needs

### Regulatory Requirements

- Aligned to Pension Funds Act regulations in terms of providing guidance
- Appointed and reviewed by Old Mutual SuperFund

- Required to be FAIS accredited
- Appointed by you

### How is the service provided to you

- Telephonic
- Email
- Face-to-face at our Pinelands office
- MS Teams

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### What exit support is offered

- Your Exit Benefit Counsellor actively contacts you
- Free Financial Wellbeing Training sessions
- Our exit journey begins once you engage with the Exit process on WhatsApp. Our EBC's will call you back at a time convenient to you to discuss the options that you have when you leave your employer's scheme with the Old Mutual SuperFund

- Your financial adviser should actively contact you to provide you with financial advice and guidance
- Personal financial planning as and when required, with an annual review

### What advice fees will be payable

This service is free to you as an Old Mutual SuperFund member

As negotiated between you and your financial adviser

### How to make contact

#### Old Mutual Exit Benefit Counsellor

- Call an Old Mutual EBC on 021 503 0069
- Email them on [membersupportservices@oldmutual.com](mailto:membersupportservices@oldmutual.com)
- Access the Withdrawal/MyClaim menu on Superfund WhatsApp and book an appointment with a Financial Adviser

#### Financial Adviser

- Contact your personal financial adviser
- If you are still employed, ask your HR department for your retirement fund intermediary or the Old Mutual Work Site Adviser contact details
- Call your Exit Benefit Counsellor who will put you in touch with a financial adviser
- Access the Withdrawal/MyClaim menu on Superfund WhatsApp and book an appointment with an accredited financial adviser

Exit Benefit Counsellor

Financial Adviser

\*EBCs are not financial advisers and therefore will not give you financial advice.