



This document serves as confirmation of the personal & business particulars of

Fourie Kritzinger

a Key Individual of Fortunate Brokers CC

Reg. no.: 2006/201965/23

as required by the FAIS Act.

FSP License No – 34853

PERSONAL PARTICULARS OF THE FINANCIAL ADVISOR

<p>Physical Address: 458 Judith Street Waterkloof Glen PRETORIA 0181</p> <p>LEGAL STATUS</p> <p>QUALIFICATIONS</p> <p>MEMBERSHIP</p> <p>EXPERIENCE Years experience in the Financial Services Industry</p> <p>Work related experience</p> <p>HOLDER OF PROFESSIONAL INDEMNITY INSURANCE</p>	<p>Postal Address: 458 Judith Street Waterkloof Glen PRETORIA 0181</p> <p>Key Individual and Financial Advisor</p> <p>BA – Degree (UP); Advanced Diploma in Financial Planning (UOFS); Diploma in Financial Planning (UOFS); 1st Level Regulatory Exams: Key Individuals & Reps</p> <p>CFP ® FPI – 200000479 (Certified Financial Planner)</p> <p>Since 1997</p> <ul style="list-style-type: none"> ➤ Old Mutual from 1997 – 2000 ➤ Taxlex Trust from 2000 – 2007 ➤ Citadel from 2007 – 2012 ➤ Fortunate Brokers from 2012 – Current <p>YES</p>	<p>Contact Details: Tel: 012 998 5309 Fax: 012 998 5732 Cell no: 083 399 6219 E-mail: fourie@fortunatemarketers.co.za</p>																																	
<p>The Financial Advisor is authorized to provide advice and intermediary services on the following Category I Product Categories:</p>	<p>PRODUCT CATEGORIES</p> <p>Long-term Insurance: Category A, B1, B2 & C</p> <p>Short-term Insurance: Personal & Commercial Lines</p> <p>Retail Pension & Pension Fund Benefits</p> <p>Collective Investment Schemes</p> <p>Health Service Benefits</p>																																		
<p>The Financial Advisor is mandated via Fortunate Brokers CC to act as intermediary on behalf of the following Companies:</p>	<table border="1"> <tr> <td colspan="3">MANDATE</td> </tr> <tr> <td colspan="3">LIFE INSURANCE & INVESTMENTS</td> </tr> <tr> <td>Hollard</td> <td>Bidvest</td> <td>PPS</td> </tr> <tr> <td>Avbob</td> <td>Liberty</td> <td>Sanlam</td> </tr> <tr> <td>Brightrock</td> <td>Momentum</td> <td>Old Mutual</td> </tr> <tr> <td>Discovery</td> <td>Itransact</td> <td></td> </tr> <tr> <td colspan="3">SHORT-TERM INSURANCE</td> </tr> <tr> <td>Discovery Insure</td> <td>Santam</td> <td>Stratum</td> </tr> <tr> <td>PPS</td> <td></td> <td></td> </tr> <tr> <td colspan="3">HEALTH SERVICE BENEFITS</td> </tr> <tr> <td colspan="3">Discovery Health; Medshield; Momentum Health and Profmed</td> </tr> </table>		MANDATE			LIFE INSURANCE & INVESTMENTS			Hollard	Bidvest	PPS	Avbob	Liberty	Sanlam	Brightrock	Momentum	Old Mutual	Discovery	Itransact		SHORT-TERM INSURANCE			Discovery Insure	Santam	Stratum	PPS			HEALTH SERVICE BENEFITS			Discovery Health; Medshield; Momentum Health and Profmed		
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<p>Did not earn > 30% of total commission for the previous year from a specific Insurer/Product Provider.</p> <p>Do not own > 10% of issued shares directly/indirectly in any Insurer/Product Provider and are not an associated company of any Insurer/Product Provider.</p>																																			
<p>CONFLICT OF INTEREST</p>	<p>This FSP has implemented a Conflict of Interest Management Policy. The FSP might on occasion receive gifts/prizes from Service Providers, the details of which are contained in the Gifts Register and is available for your perusal.</p>																																		
<p>REMUNERATION</p>	<p>Commission is indicated on quotations. Fees on all other services are available on Fortunate Brokers CC's website: www.fortunatemarketers.co.za.</p> <p>Client signature:</p>																																		
<p>COMPLAINTS</p>	<p>Kindly direct all complaints in writing to the Compliance Officer: Germa Beukes on fax 086 691 5253 or germa@siruslex.co.za</p>																																		
<p>CLAIMS NOTIFICATION PROCEDURE</p>	<p>In the event of a claim, please first contact the Financial Advisor to assist you with submitting a claim. You may also contact the Insurance Company directly.</p>																																		
<p>Long Term Insurance OMBUDSMAN: Private Bag X45 CLAREMONT, 7735 Tel: 021 657 5000 Fax: 021 674 0951 www.ombud.co.za</p>	<p>FAIS OMBUDSMAN: PO Box 74571 LYNNWOOD RIDGE, 0040 Tel: 012 470 9080 Fax: 012 348 3447 www.faisombud.co.za</p>	<p>FSCA: PO Box 35655 MENLOPARK, 0102 Tel: 0800 20 20 87 Fax: 0800 11 04 43 www.fscsa.co.za</p>																																	