

10/08/2026

Dear Client

I am pleased to inform you that Fortunate Brokers has concluded an exciting and a mutually beneficial association agreement with one of the largest networks of professional advisory firms in South Africa, PSG Wealth Financial Planning (Pty) Ltd.

How you will benefit

This partnership is, above all, in your interest.

1. The backing of a leading financial services organization

PSG offers a comprehensive range of products to meet your needs and has well-established relationships with the respective product providers with whom Fortunate Brokers has had agreements. As part of PSG, we benefit from its influential brand, watertight legal and compliance infrastructure, and technological capabilities. Through PSG's secure online platform and app, you always have direct access to your investments and policies.

2. A greater client focus

Being able to rely on PSG's operational support frees me up to focus my attention on client matters and strengthening my client relationships.

3. A broader range of products and services

You will have access to a broader range of products and services.

4. A continuing relationship

Our association agreement with PSG guarantees an automatic succession plan in the event of my death or retirement.

How you are impacted

Our name will be changed to PSG Wealth Fortunate, and I remain your adviser and your first point of contact. Our office will not be relocated. The address and contact details will remain the same. Only our email addresses will be changed.

The existing investments and policies I have implemented for you are unaffected, and your fees remain unchanged.

My email address will be changed from fourie@fortunatebrokers.co.za to fourie.kritzinger@psg.co.za. Within the next few weeks, you will also receive a letter from us on our new letterhead with new email addresses of all staff. If you have any questions or concerns in the meantime, please don't hesitate to contact me directly at the office on +27 012 9985309 or +27 83 399 6219.

I am proud to form part of one of the largest networks of professional advisory firms in the country. Together we are sure to bring new vigor and continued prosperity to your financial well-being.

Kind regards

FOURIE KRITZINGER