AN OVERVIEW OF THE OLD MUTUAL WEALTH AND UNIT TRUSTS PLANNER WEBSITE

EASIER TO DO BUSINESS WITH US

Our clients and planners are at the centre of our business. To make it easier for you to manage your clients' investments we have designed our secure planner website to encourage you to focus on your clients' unique investment needs, one client at a time.

Simplifying your online experience through our enhanced transaction capabilities is key to ensuring that you spend your time on the things that matter most; enriching your client relationships.

We are not only enhancing your online experience but also your clients'. With the Old Mutual Wealth Mobile Client App, your clients can approve the transactions you submit on the secure website – no paper, no email and at their convenience.

THE BENEFITS OF DOING BUSINESS ONLINE

01 CLIENT-CENTRIC

02 FAST AND EASY TO USE

03 LESS ADMINISTRATIVE REQUIREMENTS

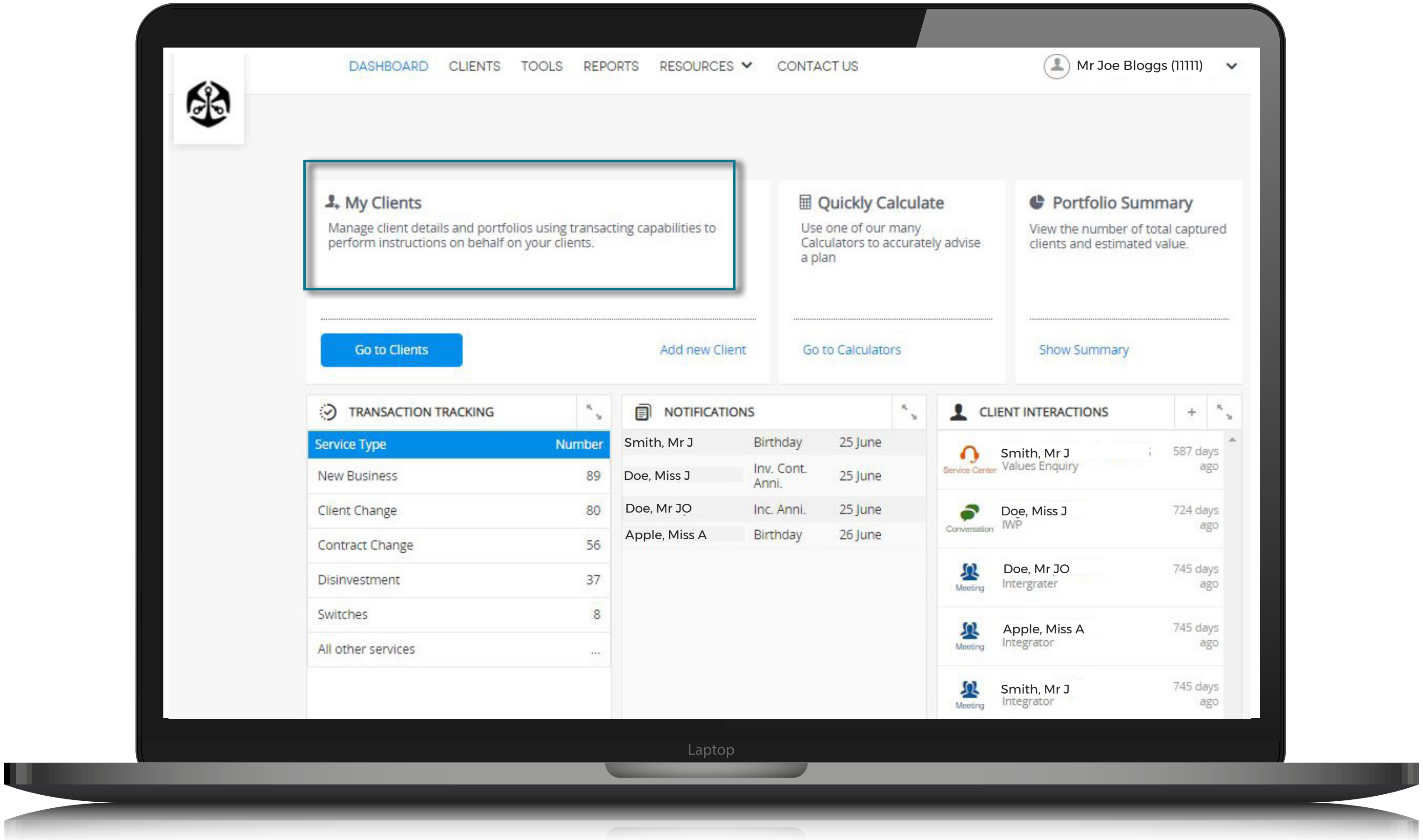
04 LESS PAPERWORK

05 MULTIPLE TRANSACTIONS AT THE SAME TIME

06 ELECTRONIC SIGNATURE WITH CLIENT APP

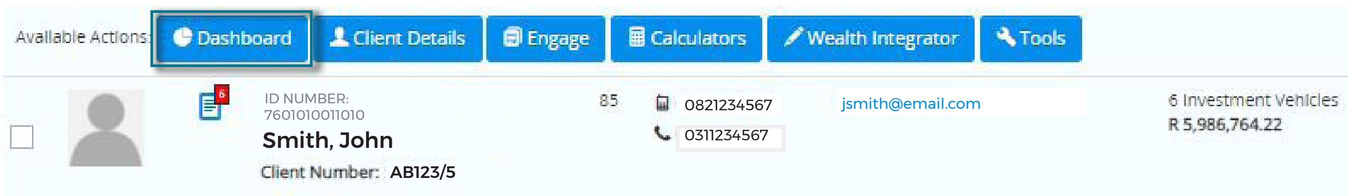
IT ALL STARTS WITH THE DASHBOARD...

Your unique dashboard provides an overview with multiple access points for you. At a single glance you can see your client's investment information, access quick links to tools and investment reports as well as submit transactions online in a safe and secure environment.



01

Select the client whose investments you would like to review and then select **"Dashboard"**.



INSIGHT THROUGH FOCUS

Encouraging you to focus on your clients' financial needs, one client at a time, is facilitated through the **Client Dashboard**. Once you have selected a specific client, the dashboard provides an overview of your client's entire portfolio. At a glance, you can see the proportion of your client's portfolio that falls within savings, retirement savings and retirement income categories.

The **interactive graph** allows you to choose the relevant level of detail that you want to view, whether it is at a holistic portfolio level or a more detailed contract or fund level, the choice is yours.

CONSISTENCY IS KEY

We have aligned the investment experience for clients across both the secure website and mobile app as well as their quarterly statements. Now, no matter where your clients choose to review their investment information, they will have a consistent experience, where their information is presented in a graphic-rich way that is easy to understand.

FOCUSED IMPLEMENTATION BY DESIGN

The Client Dashboard is designed to provide you with quick access points to manage your client's investment. Whether you need to generate online reports for investment reviews, track existing transactions that you or your client has submitted and view outstanding requirements, or whether you want to submit a new investment for a particular financial goal that your client may have, all of these options are available at the click of a button.

01

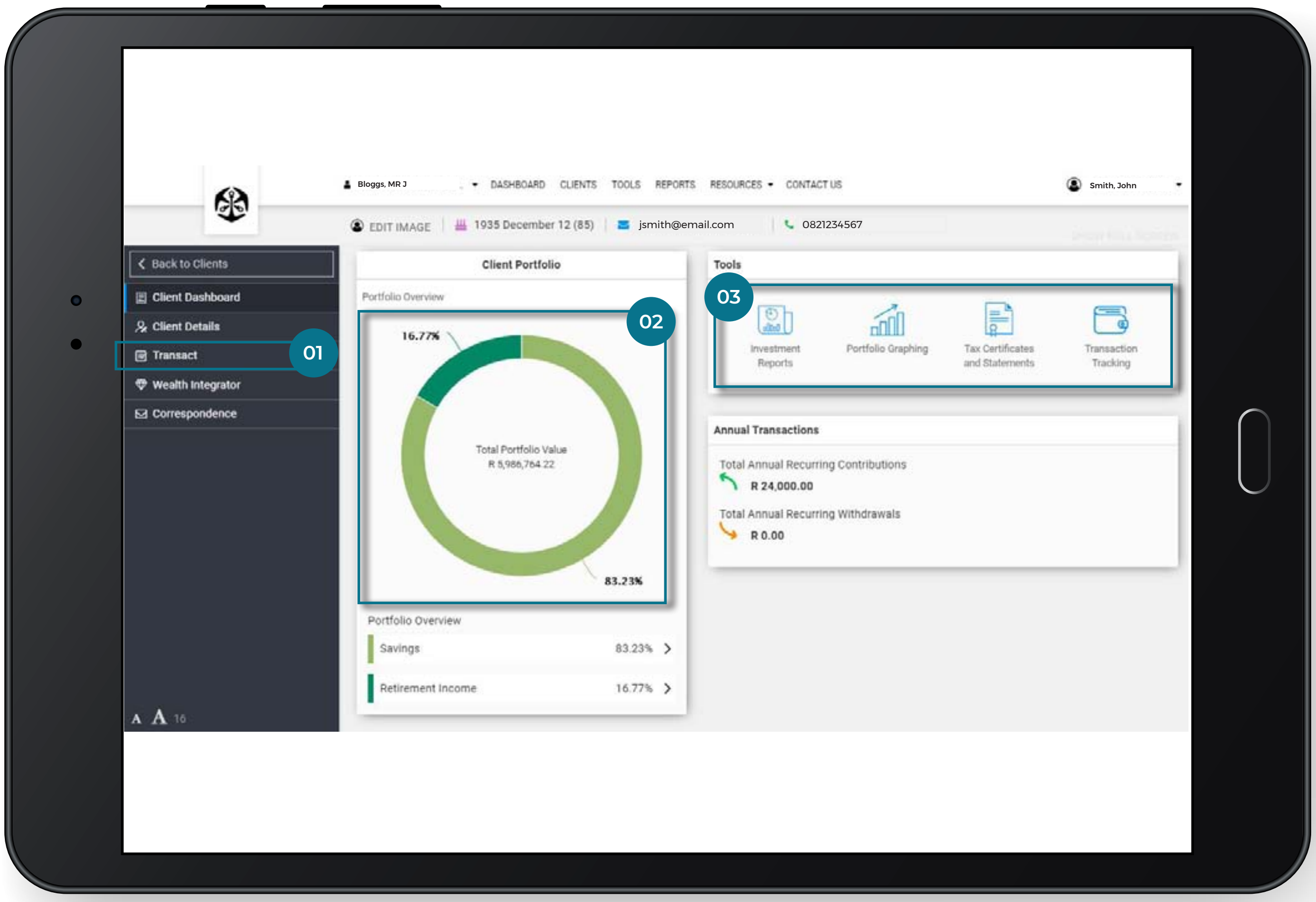
Submit **new or additional investments, switches, disinvestments** or update any personal or contract details for your client.

02

Click on the **interactive graph** to review more detailed investment information at a contract or fund level.

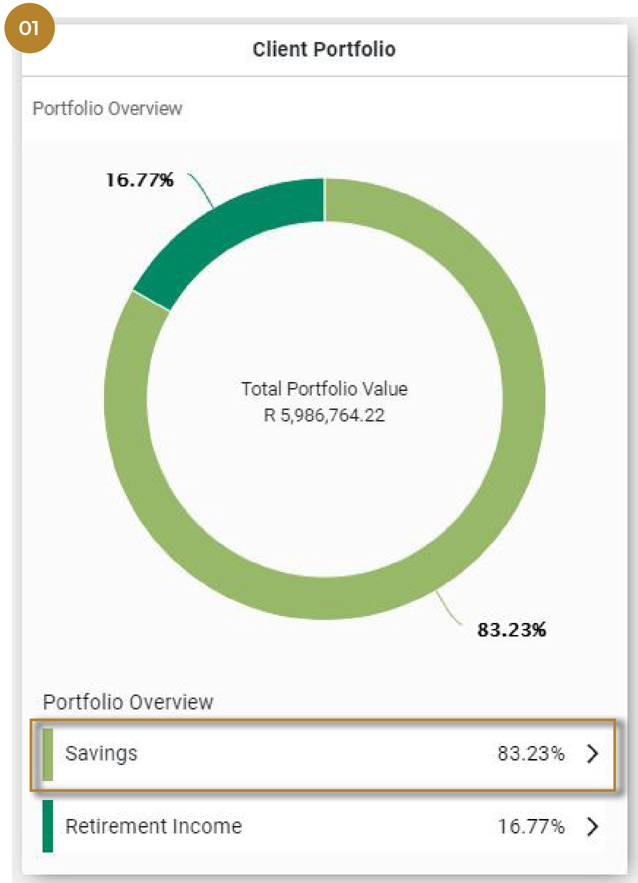
03

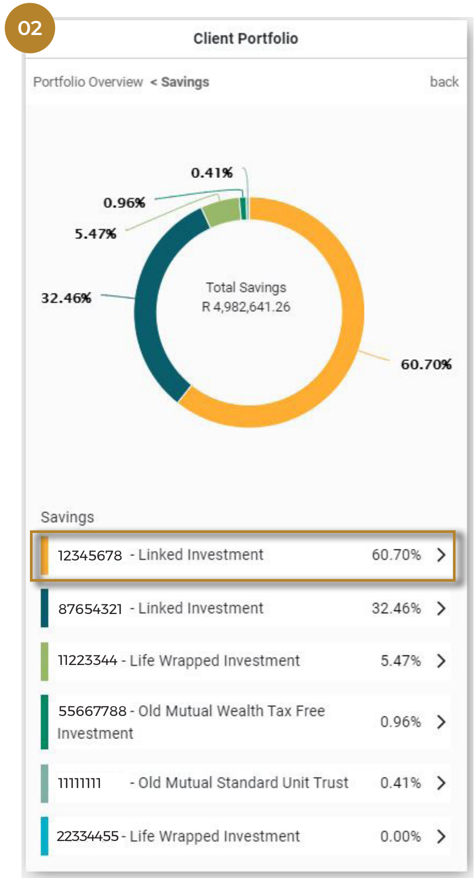
Quick links to view **online reports, tax certificates** or any **pending transactions submitted** for your client.

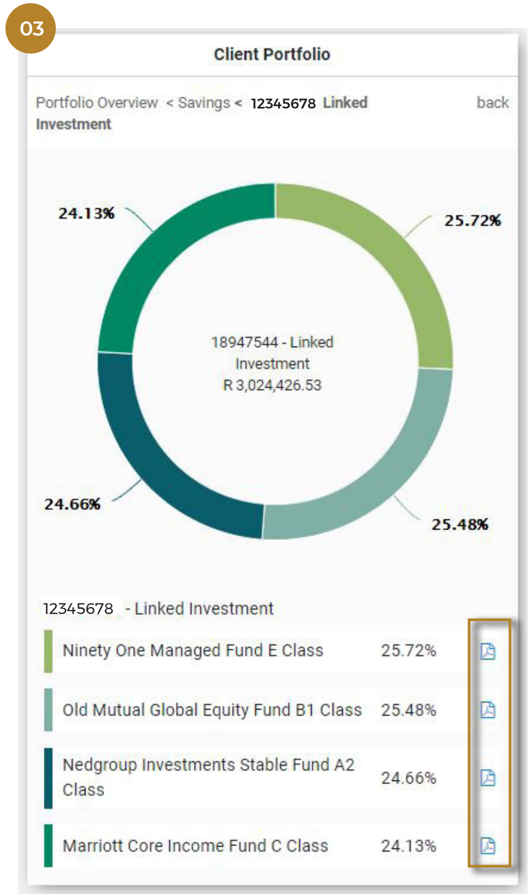


INTERACTIVE GRAPHS

Depending on the reason for reviewing your clients' investments, you can choose the level of detail that you want to view. Once at a fund level, you can download the latest fund fact sheets for all existing funds within your client's investment.



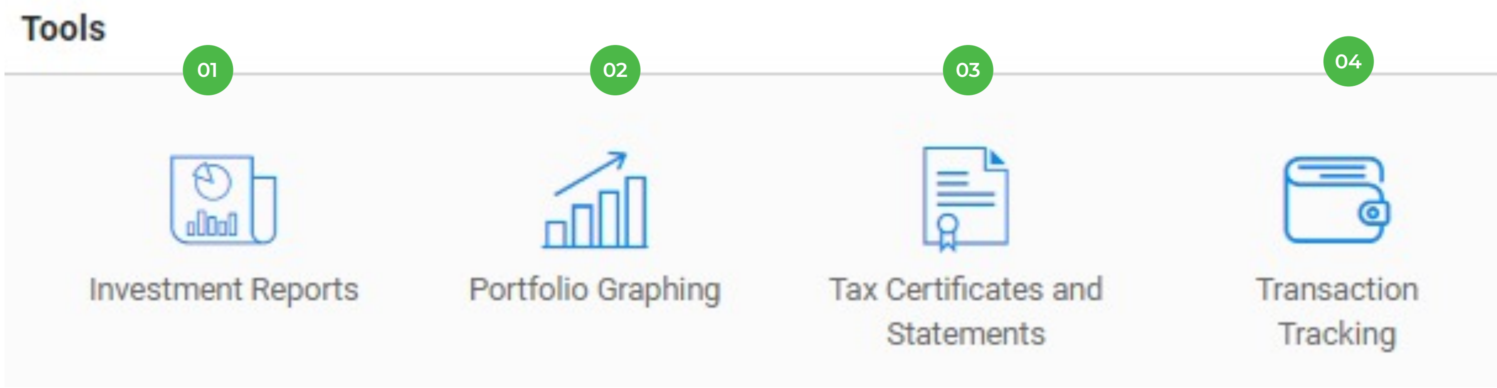




QUICK LINKS TO TOOLS

The dashboard provides easy access to:

- Investment Reports
- Portfolio graphing
- Tax Certificates and Statements
- Transaction Tracking



01

Access a variety of online reports that provide detail on your client's **investment performance, transaction statements** and **fees.**

02

Track the performance of your **existing funds***over a 1, 3, 5 or 10 year graphing period.

03

Download your client's **latest tax certificates** or review any other tax certificates for previous tax years.

04

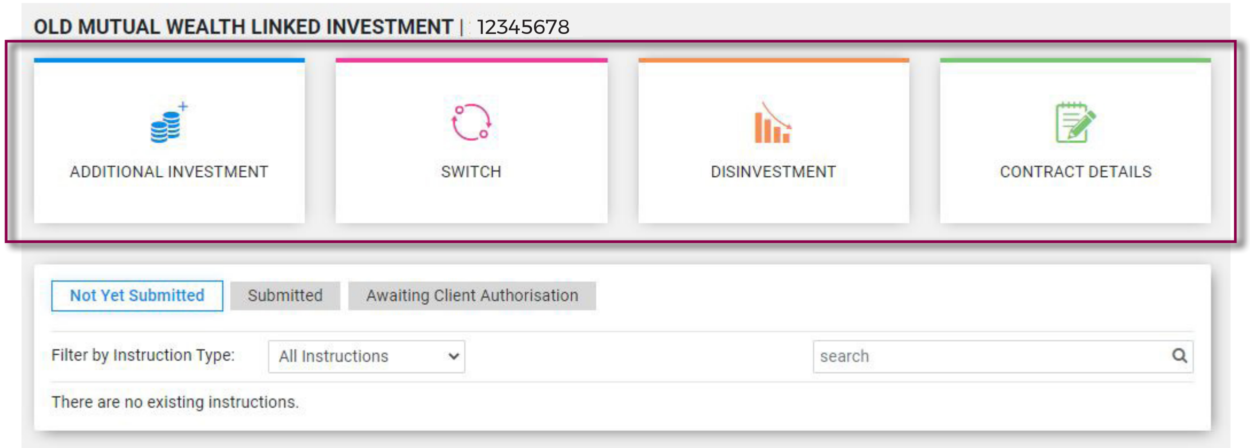
You can **easily track the progress of all transactions submitted by yourself and your client** as well as view whether there are any outstanding requirements for a particular transaction.

**Please note that this functionality only allows you to track your client's fund performance for the selected period and not the actual investment.*

TRANSACT ONLINE

Transacting online has never been easier. All you have to do is:

1. Select the investment that you want to transact on
2. Capture the relevant details
3. Upload any supporting documents and click Submit.



Planner Benefits

- Quick & easy to use
- Paper-based applications only required for certain transactions
- Submit multiple transactions at the same time
- Transact in a secure online environment

OLD MUTUAL