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

WEALTH

INNOVATIVE. ONLINE. INTERACTIVE.

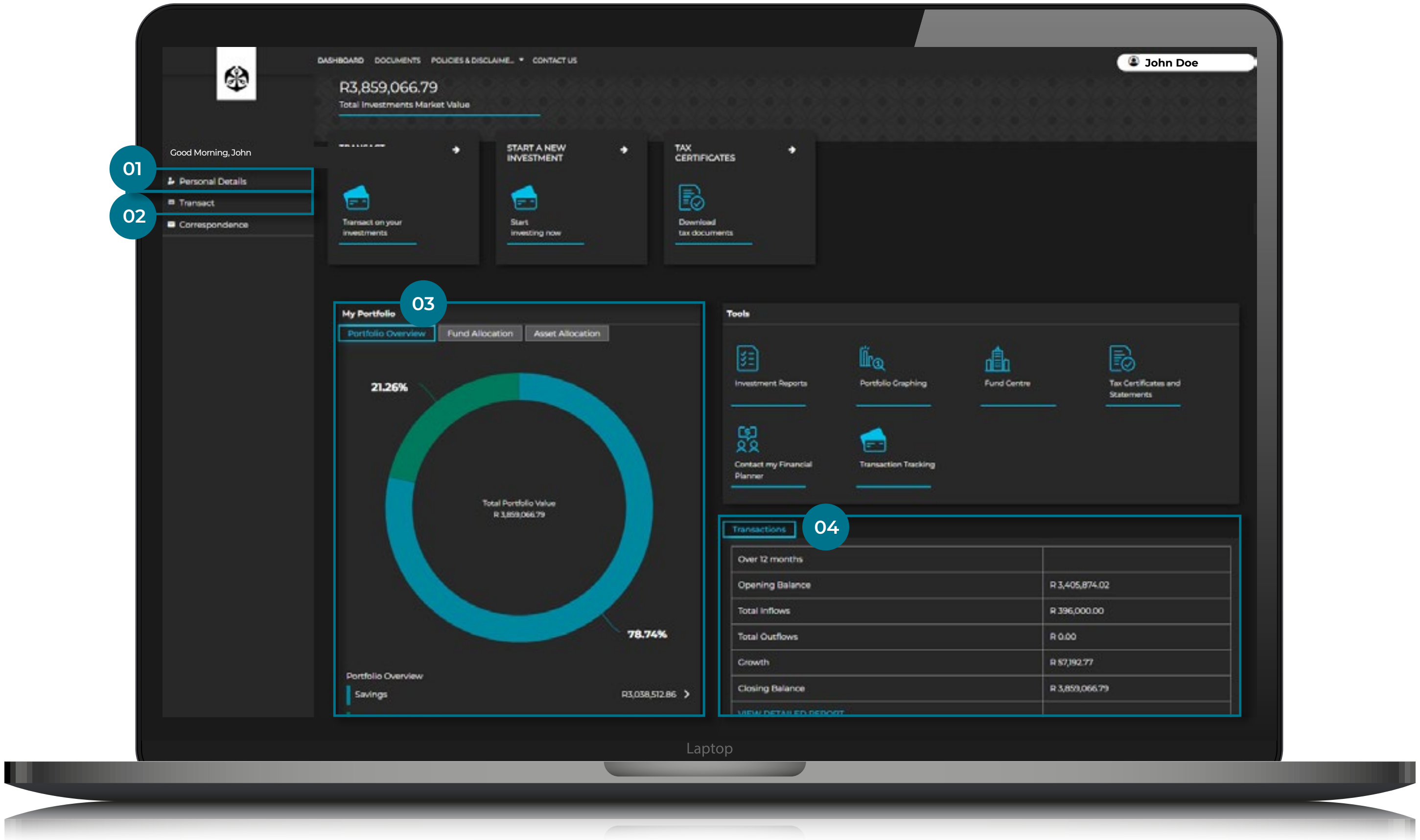
Our clients are at the centre of our business. To make it easier for you to manage your investments we have designed our secure client website to deliver a seamless online investment experience.

The Old Mutual Wealth and Unit Trusts client website offers you a range of online capabilities that provide comprehensive investment reporting and transaction functionality in a secure online environment that is available 24 hours a day.

- Quick & easy to use
- Submit multiple transactions at the same time
- An alternative to paper-based applications
- Transact in a secure online environment

IT ALL STARTS WITH THE DASHBOARD...

Your unique dashboard provides multiple access points to view your investment information, quick links to tools and investment reports as well as the ability to submit transactions online in a safe and secure environment.



01

Update your personal, contact or employment information by clicking on **"Personal Details"**.

02

Submit online investment transactions with ease – simply click on **"Transact"** and select your contract number and the relevant transaction.

You can also use the quick links tool buttons on the dashboard to **"Transact on your Investments"**, **"Start a new investment"** and to **"Download tax documents"**.

03

At a glance, you can view your **total portfolio value**, with a breakdown of the types of investments within your portfolio: **savings, retirement savings** or **retirement income.**

04

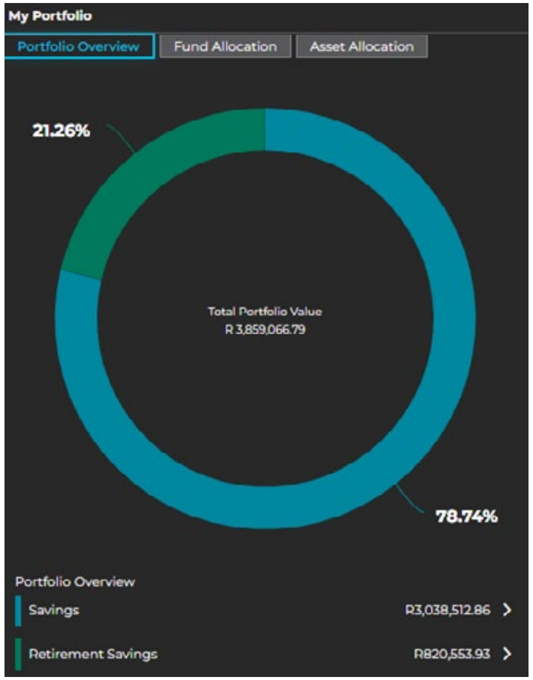
You can also view a **summary of your investment(s)** over the past 12 months.

If you click on the graph on the left hand side and select a contract number, you can also see further details about your **transactions, recurring debit orders, regular withdrawals and contract information**.

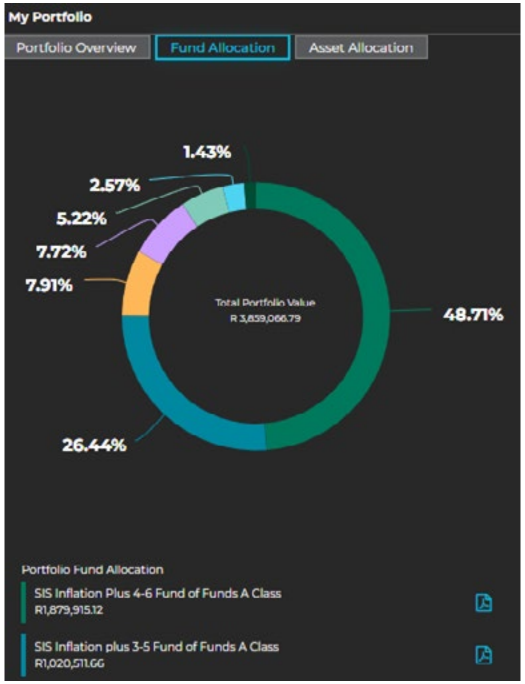
YOU CHOOSE THE DETAIL THROUGH OUR INTERACTIVE GRAPHS

VIEW YOUR INVESTMENT INFORMATION: Whether you want a holistic view of all of your holdings at a contract level or whether you require a more detailed view at a fund level, the interactive graph gives you three options to choose from below **"My Portfolio"**.

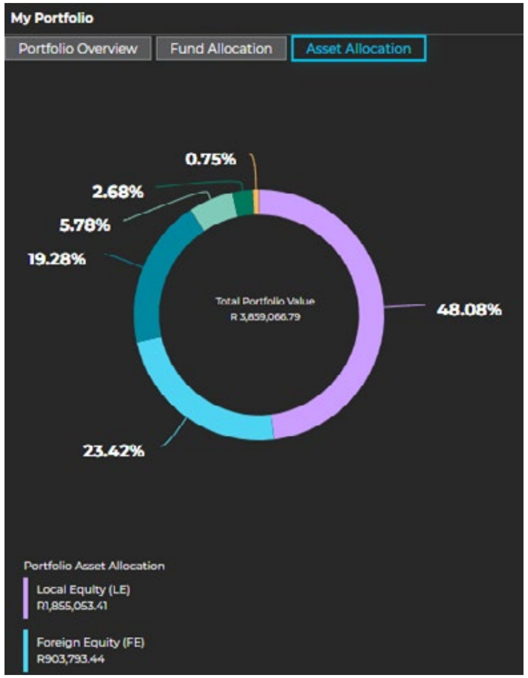
01 Portfolio Overview



02 Fund Allocation



03 Asset Allocation

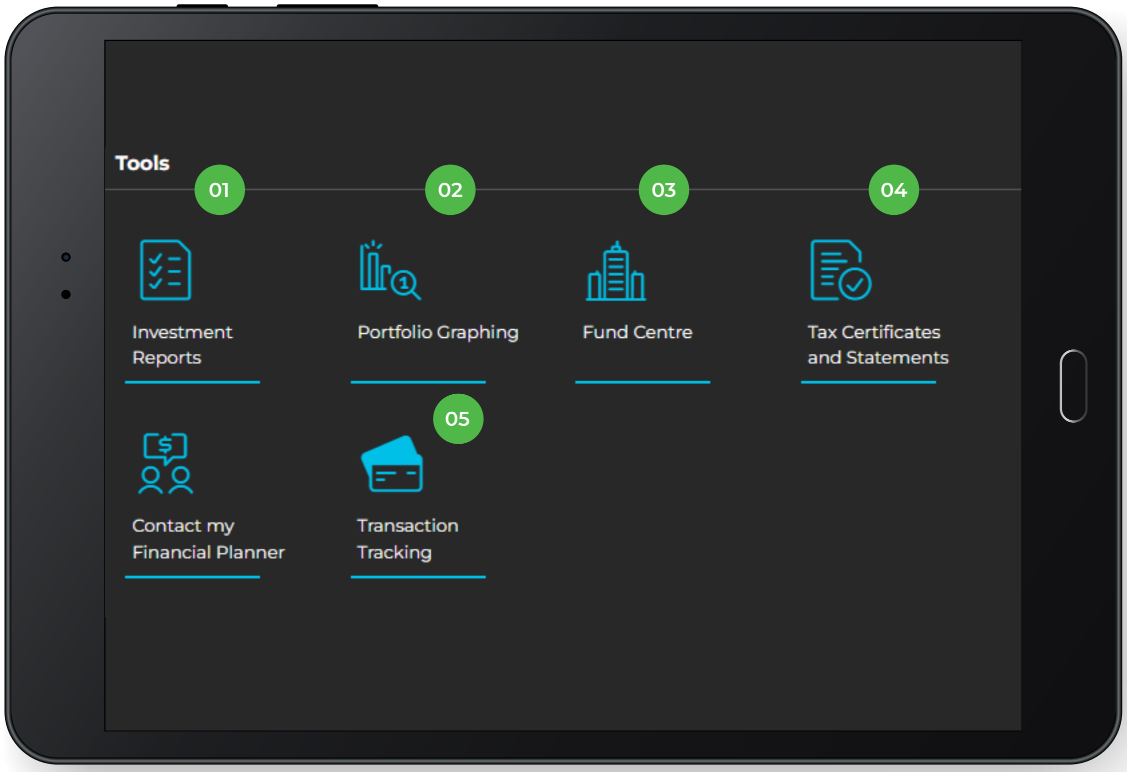


Each click on our **interactive graph**, reveals more detail about your entire investment portfolio, individual investment contracts as well as further detail about the underlying funds you are invested in.

QUICK LINKS TO TOOLS:

Your personal dashboard provides easy access to:

- Investment Reports
- Portfolio Graphing
- Fund Centre
- Tax Certificates and Statements
- Transaction Tracking
- Contacting your Financial Planner *(where applicable)*



INVESTMENT INSIGHTS...

01

Access a variety of online reports that provide detail on your **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 the **latest fund fact sheets** for your existing funds or any funds that you may be interested in.

04

Download your **latest tax certificates** or review tax certificates for previous tax years.

05

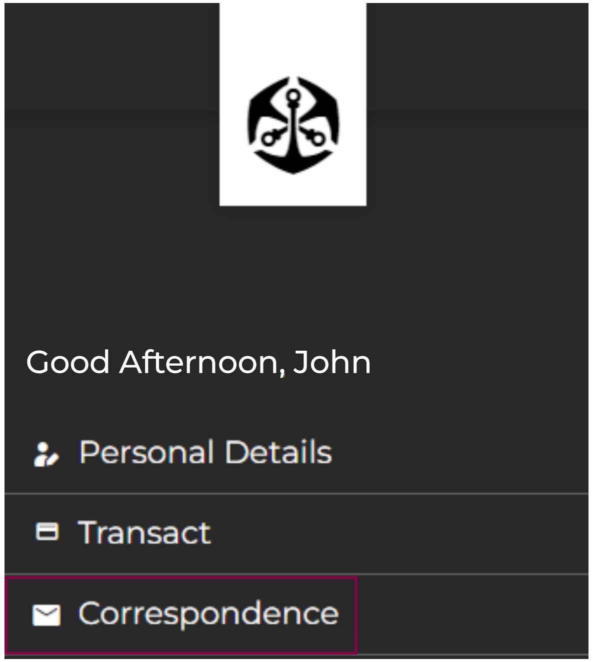
You can **easily track the progress of all transactions submitted by yourself and your planner** (where applicable) as well as view whether there are any outstanding requirements for a particular transaction.

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

VIEW YOUR CORRESPONDENCE:

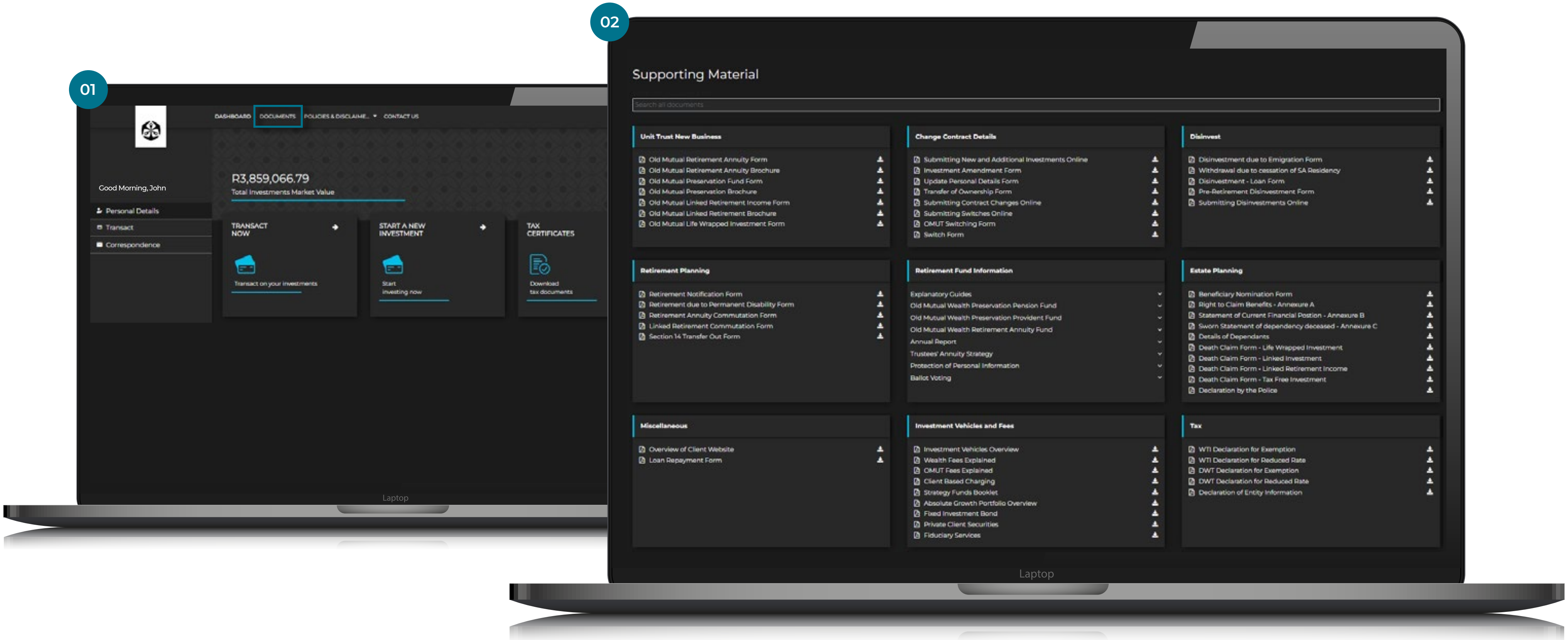
Access all of your Old Mutual Wealth and Unit Trusts mandatory correspondence in one place. Examples of legislative or mandatory correspondence include:

- Investment Confirmation Letter
- Quarterly Statements
- Tax Certificates
- Provisional Tax Statements (where applicable)
- Change of Beneficiary
- Breach of Retirement Fund Limits (Regulation 28 compliance)



ACCESS TO INVESTMENT INFORMATION AND APPLICATION FORMS:

You can easily access marketing information on our investment offering as well as all of the relevant application forms you may need to transact on your investment(s).



ANYTIME, ANYWHERE...

OLD MUTUAL WEALTH'S CLIENT APP COMPLEMENTS THE CLIENT SECURE WEBSITE

We have enhanced the overall digital experience for you, our clients. **The Old Mutual Wealth Client App** provides you with easy access to your portfolio information at any time, gives you an overview of all of your Old Mutual holdings in one place as well as the ability to approve any submitted transactions through electronic signature functionality.

TRACK YOUR TRANSACTIONS ONLINE

Our online Transaction Tracking tool allows you to follow the progress of transactions that you or your planner have submitted, as well as view any outstanding information that may be required.

OLD**MUTUAL**

WEALTH

Old Mutual Wealth is an elite service offering brought to you by several licensed FSPs in the Old Mutual Group.