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MASTHEAD MEMBER / LID  
VMR LID / IBC MEMBER  
FSB NO 26/10/3493  
CMS BR: 2116

\* LEWENS EN KORTTERMYN VERSEKERING \*  
\* BELEGGINGS \* BEGRAFNIS DEKKING \*  
\* MEDIESE SKEMAS \* PENSIOENSKEMAS \*  
\* LIFE AND SHORT TERM INSURANCE \*  
\* INVESTMENTS \* FUNERAL COVER \*  
\* MEDICAL SCHEMES \* PENSION SCHEMES \*

**PROFCON**

An Authorised Financial Services Provider

**Putting You and your Business First**

## LIFE INSURANCE Disclosure Document

Client \_\_\_\_\_

Date of Birth: \_\_\_\_\_

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### THE ACCREDITED ADVISOR

I, \_\_\_\_\_, am a representative of Profcon rendering services under supervision as defined in the Fit and Proper regulations with experience in giving financial advice in the field of Personal and Commercial Short Term Insurance. I am remunerated for my services by the payment of commission **as allowed by legislation**, and/or by fees as agreed on beforehand by broker and client.

I have been a qualified financial advisor since \_\_\_\_\_. I have the minimum required Grade 12 (NQF 4) qualification as well as a \_\_\_\_\_ qualification.

Profcon representatives are fully trained and have passed a qualifying test on product knowledge. The Brokerage takes responsibility for representatives providing a contract or mandatory agreement that is not older than three months. I wish to advise you that all information obtained from you or acquired about you will remain confidential unless you provide written consent, or if I am required by law to disclose such information.

### PROFCON

An equal opportunity company with its Head Office based at 82 Somerset St, Graaff-Reinet. The Company has been in the insurance/medical aid industry since 1988. Profcon has **no shares** in any Life Assurance/Short term/Medical Aid company and more than **30%** of their business is with Medical Aids.

We do not handle **cash** or **undeclared funds** and have a register of non-cash incentives. Together with its Board of Directors and representative, Profcon places its **clients and their business first**. One of Profcon's main aims is **job creation**, hence the expansion of service centres to all provinces, countrywide. We service not only the towns and cities but surrounding areas as well.

I, Stephanus Johannes George Bezuidenhoudt (T/A **Profcon / FB Makelaars**), possess Professional Indemnity Insurance through the FIA and take full responsibility for any employee who gives financial advice should he/she be able to produce an letter of appointment from this brokerage..

Our Compliance officer is **Masthead Distribution Services (Pty) Ltd. (PO Box 856, Howard Place, 7450) ☎ 021-686-3588 Fax 021-686-3589**. You are entitled to receive a copy of the Statutory Notice where your interests as a Policy Holder are noted.

**ACCREDITED FOR:** Long Term Insurance - Category A, B1, C; Short Term Insurance - Personal Lines, Commercial Lines; Retail Pension Fund Benefits, Pension Fund Benefits, Deposits as defined in the Banks Act; Participatory Interest in one or more Collective Investment Schemes; Health Service Benefits provided by a Medical Scheme as defined in Section 1 of the Medical Schemes Act of 1998.

### HOUSE RULES

This Brokerage does not take any risk in investment fund (Endowment, RA, Investments) selections. We only invest in Money Market funds, Guaranteed funds and Metropolitan Smooth bonuses.

Our preferred provider(s) for:

Medical Aid Cover: **Resolution Health, Sizwe, Discovery, Medshield, MediHelp & Fedhealth.**

Short Term (Personal/Commercial) Insurance: **New National, SANTAM, Auto&General, BnBSure & Mutual & Federal.**

Agricultural Insurance: **LANSURE and SANTAM.**

Life Insurance: **Sanlam, Old Mutual, Liberty Life, Metropolitan, Odyssey, Altrisk, Discovery Life and Resolution Life.**

Investments: **Alan Grey Stanlib, Glacier and Max Investments.**

Funeral Cover: **Metropolitan, Assupol, Sanlam Sky, OM Group, Real People and Regent**

### ANALYSIS

I am interested in a shortened analysis ☒ ☐ I would like a detailed analysis (done at no extra cost by legal consultant) ☒ ☐  
If **NO** to above questions, REASON: I do not have enough time to provide information ☐ or I do not have all the information available ☐

initial

initial

<b>Client Signature:</b>	<b>Financial Advisor Signature:</b>
<b>Client Name:</b>	<b>Financial Advisor Name:</b>
<b>Date:</b>	<b>Date:</b>