



MOOIRIVIERTM

MEDIESE FONDSE • MEDICAL AID

Moorivier Mediese Fondse (Pty) Ltd

Reg No: 2018/417415/07

(Directors:

E Schoch & SC Van Staden)

📍 Walter Sisulu Street No. 11, Potchefstroom, 2531

✉ Email: mooimed@moorivier.com

📞 Phone: (018) 294-8109

🌐 www.moorivermedies.co.za

INITIAL STATUTORY / WRITTEN DISCLOSURE: REPRESENTATIVE

Business Details:

FSP Licence Number:	43939
Address:	No. 11 Walter Sisulu Street, Potchefstroom, Northwest
Contact Person:	Susanna Catherina van Staden (Key Individual & Representative)
Telephone Number:	018 294 8109
Fax Number:	086 653 6731
Cellular phone number:	073 339 3144
Financial Advisor:	Susanna Catherina van Staden (Key Individual & Representative)
Cellular phone number	073 339 3144
E-mail Address	mooimed@moorivier.com

Legal and Contractual Status

The Financial Service Provider is registered as a Company, Moorivier Mediese Fondse (Pty) LTD and is a duly authorised intermediary of the following product suppliers:

1)	Discovery Health Medical Scheme	Phone: 0860 998 877
2)	Fedhealth Medical Scheme	Phone: 0860 002 153
3)	Bonitas Medical Scheme	Phone: 0860 002 108
4)	Bestmed Medical Scheme	Phone: 0860 002 378
5)	Profmed Medical Scheme	Phone: 0860 679 200
6)	Key Health Medical Scheme	Phone: 0860 671 050
7)	Discovery Life Limited	Phone: 0860 005 433
8)	Stratum Benefits	Phone: 0861 113 499
9)	PPS Life Insurance	Phone: 0860 777 784



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No conditions or restrictions have been imposed by any of the above product suppliers.

The financial advisor is an authorised representative of Moorivier Mediese Fondse Pty LTD and has been appointed in terms of a written agreement. Moorivier Mediese Fondse Pty LTD accepts responsibility for its own actions and for the actions of the financial advisor that may be performed by him or her acting within the course and scope of his or her employment with the provider.

Qualifications

The advisor, SC van Staden qualification consist of the following:

Matric with BA Komm. IV-degree PU for CHE now (NWU)

Passed the 1st level regulatory exams for key individuals – RE1.

Passed the 1st level regulatory exams for representatives – RE5.

Passed the wealth management programme – NQF5.

Financial Services for which Authorised.

In terms of the licence issued to Moorivier Mediese Fondse Pty Ltd by the Registrar, the financial advisor is authorised to provide financial services in respect of the following financial product categories:

No conditions or restrictions have been imposed by the Registrar.

Products Approved

Category Description	Advice Automated	Advice Non-automated	Intermediary Scripted	Intermediary Other
CATEGORY I				
Long-Term Insurance subcategory A		X		X
Short-Term Insurance Personal Lines		X		X
Long-Term Insurance subcategory B1		X		X
Long-term insurance subcategory B2		X		X
Long-term Insurance subcategory B2-A		X		X
Long-term Insurance subcategory B1-A		X		X
Short-term Insurance Personal Lines A1		X		X
Long-Term Insurance subcategory C		X		X
Retail Pension Benefits		X		X
Participatory interests in a collective investment scheme		X		X
Health Service Benefits		X		X

Moorivier Medies is accredited by the Council for Medical Schemes - ORG 3987

Moorivier Medies is an authorised Financial Services Provider - FSP 43939



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Compliance Department

The provider has appointed Masthead (Practice No 67) as its external compliance practice. Masthead is a national supplier of risk management & compliance services to financial advisors and other licenced financial services providers (FSPs). The Compliance Officer is Mr Gideon Potgieter, 082 372 0332, 051 401 8300, Masthead, 7 Collins Avenue, Arboretum, Bloemfontein, 9301

Email: gpotgieter@masthead.co.za

Professional Indemnity

Underwritten by Leppard and Associates (Pty) Limited, an Authorised Financial Services Provider (FSP 274) for and on behalf of Lombard Insurance Company Limited, an Authorised Financial Services Provider (FSP 1596)

Disclosure of Interest and Remuneration

Please note that the provider has established a Conflict-of-Interest Management policy which requires your financial advisor to disclose any actual or potential conflict of interest to you. A copy of the Conflict-of-Interest Management Policy is available to the client at this office during office hours each day. Neither the provider nor your financial advisor holds directly or indirectly more than 10% of any product supplier's shares or an equivalent financial interest. Your financial advisor has received more than 30% of his/her total remuneration, including commission from Discovery Health during the preceding 12 months.

Complaint Resolution System and Procedures

Should you be dissatisfied with any aspect of the service performed by the provider or your financial advisor, you should address your complaint in writing to the Key Individual at the above address or email: mooimed@moorivier.com. Please note that we have established a written internal compliant resolution system with detailed procedures. Access to written procedures and a copy of the complaint resolution system is available to clients at this office during office hours of the day.

Signing of Incomplete Documents

You are hereby advised and cautioned that no person acting on behalf of the provider may during the rendering of a financial service request ask you to sign any written or printed form or document unless all details required to be inserted thereon by you or on your behalf have already been inserted.



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Responsibility for Correctness and Completeness of Information

Please be aware when completing any documentation or providing any information, that all material facts must be accurately and properly disclosed by yourself. You are entirely responsible for the accuracy and completeness of all answers, statements or other information provided by you or on your behalf.

Please note that all material facts in respect of any application, proposal, order, instruction, or other contractual information that is required to be completed for, or submitted to a product supplier by or on your behalf that relates to the purchase of or investment in any financial product, including any amendment thereof or variation thereto, must be accurately and properly disclosed.

Any misrepresentation or non-disclosure of a material fact or the inclusion of incorrect information could result in the cancellation of the transaction by the product supplier.

Waiver of Rights

You are hereby advised that no financial advisor or any other person may ask you or offer any inducement to you to waive any right or benefit conferred on you by or in terms of any provision of the General Codes of Conduct. A copy of the Code of Conduct is available on request.

General

The provider may from time to time receive non-cash incentives from product suppliers or indirect consideration from other persons. The provider will make available specific details should this occur.

All information obtained or acquired from you, the client, will remain confidential unless you provide written consent, or unless we are required by any law to disclose such information.

I hereby confirm that a copy of the above document was handed to me.

Signed for and on behalf of the Client

Place:

Date:

Name:

Signature: