



Associated Broker

Authorised Financial Services Provider 34046

Disclosure as Required by the Financial Advisory & Intermediary Services Act

| | | | |
|---|--------------------------------------|--|---------------------------------|
| Hollins Insurance Brokers CC/TA Associated Brokers | Physical Address: Postal Address: | Unit 9B Bishop Court Warrior & Delamore Road. <i>P O BOX 146 KLOOF 3610</i> | Corner of Hillcrest 3610 |
|---|--------------------------------------|--|---------------------------------|

Email Address:
gary@associatedbroker.com

Contact Number: 0872350000

Cell Phone: 0845295617

Gary Wilson is an authorized Financial Services Provider of Hollins Insurance Brokers, who is registered as a Key Individual and is licenced to render financial services. A copy of the licence, which contains details of the financial services I am authorized to provide, as well as any exemptions, is available for inspection on request.

Legal Status and Contractual Relationship

The intermediary is an independent broker who is paid for his/her services in the form of a fee and commission. He does not hold more than 10% of the shares issued by any insurers, and did not receive more than 30% of his total commission and remuneration from any one life/short term assurer during the previous calendar year.

Qualifications and Experience

The intermediary has experience in providing advice on the following topic(s):
death and disability planning/ retirement planning/ investment planning / estate planning / medical aids / short term (personal and commercial lines).

The intermediary has the following qualifications:

Intermediary Certificate of Business Studies - Institute of Insurance SA
Marketing & Sales Management Diploma
NQF level 5 (120 credits)
Certificate in Banking IBSA
Certificate Bookkeeping IMSA
NQF 6 Regulatory Environment

Professional Indemnity Insurance

The intermediary has professional indemnity insurance with Hollard insurance company. A copy can be provided on request

Compliance & Complaints

Compliance Officer
National Compliance company
e-mail info@nationalcompliance.co.za
share call 0860104194
Ph 0329462921/2949

Fax 0329462225
http:www.nationalcompliance.co.za
Practice number 1307
4 Brabham House, Garlicke Crescent, Crowthorne Corner, Ballito

A copy of our complaints handling process is available on request.

Mandate & Product Accreditation

The intermediary is authorized and accredited to give advice on all the products as listed below:

- Liberty/Liberty Health
- Hollard Insurance/SA Eagle/AIG
- Santam / Mutual and federal/ U MS /CEU/Cross county/various
- Momentum
- Discovery Life / Discovery Health
- Sanlam/Resolution Health/life

7. Particulars of Long -term Insurance Ombudsman

PO Box 74571
Lynwood Ridge
0040
Tel: (012) 4709080
Fax: (012)3483447
Boabab house
Eastwood office park
Lynwood Road
PRETORIA

8. Particulars of Registrar of Long-term Insurance

Financial Sector Conduct Authority (FSCA)
PO Box 35655
MENLO PARK
0102
Tel: (012) 428-8000
Fax: (012) 347-0221

9. Particulars of Short -term Insurance Ombudsman

FAIS OMBUD
PO Box 74571
Boabab House, Eastwood Office Park
Lynwood Ridge
Lynwood Road
PRETORIA
0040
Tel (012) 470 9080
Fax (012) 348 3447

The FSP abides by Treating Customers Fairly (TCF) and the Protection of Personal Information (POPI). A copy of the TCF and POPI Policy is available upon request.

Client Signature

Date