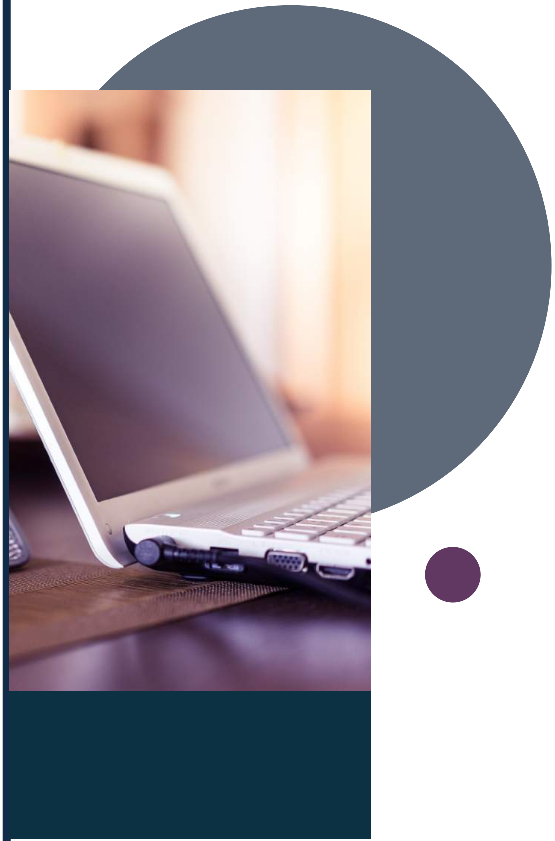
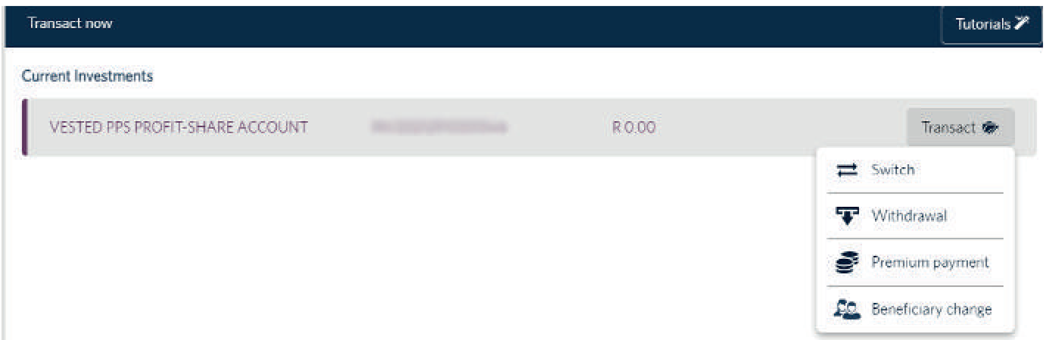


INVESTMENTS

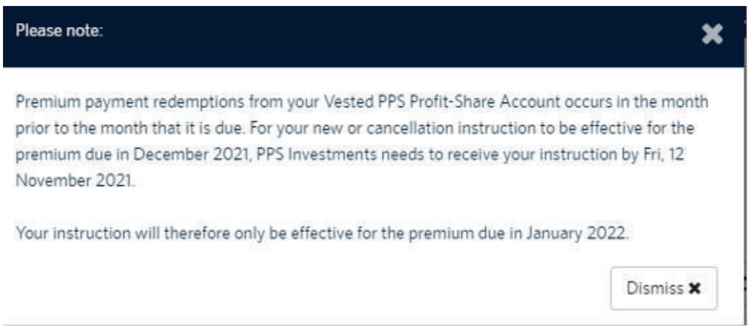
ACTIVATING PREMIUM PAYMENT(S) FROM THE **VESTED PPS PROFIT-SHARE ACCOUNT**

As the financial adviser, you can activate premium payments on behalf of your clients, who are qualifying PPS members. Simply log in to the PPS Investments Secure Site and follow the steps below.

Step 1:
On the client dashboard, navigate to Transact Now.
Select "Transact" next to the Vested PPS Profit-share account.
Select "Premium Payment".

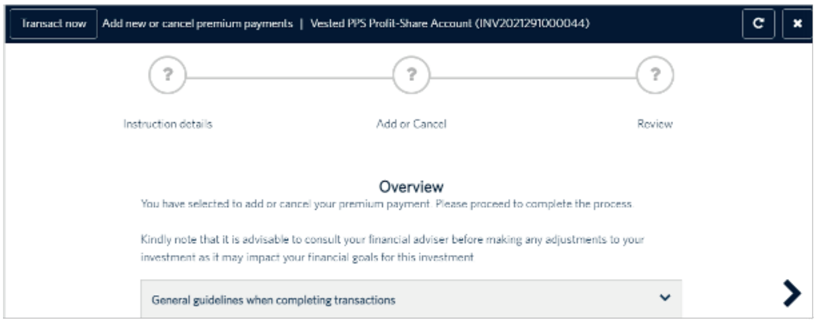


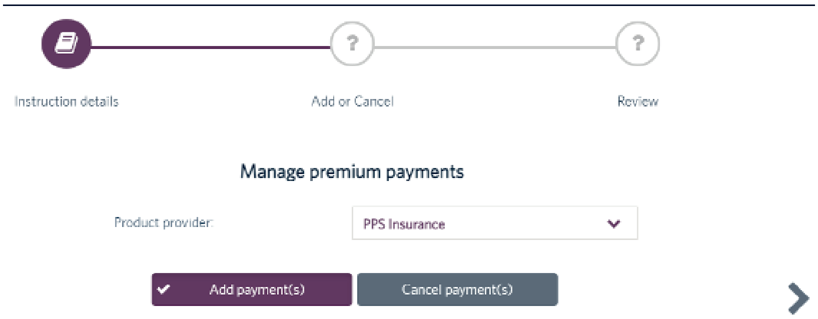
Step 2:
Note the important instruction and processing dates in the pop-up notification



Step 2 cont.:
Click the right arrow to continue.

Select the policy linked to the client's portfolio on the drop-down menu.

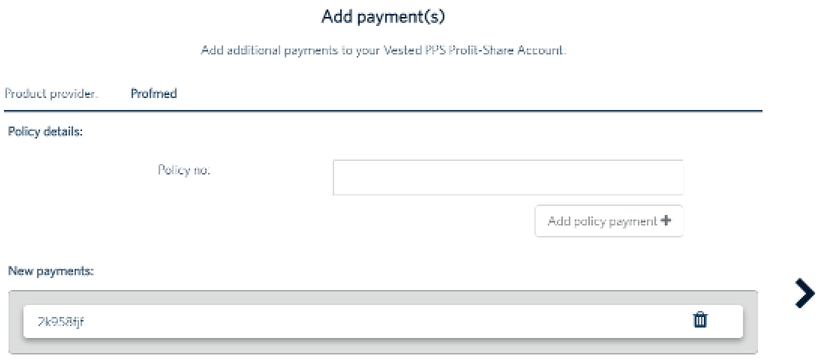




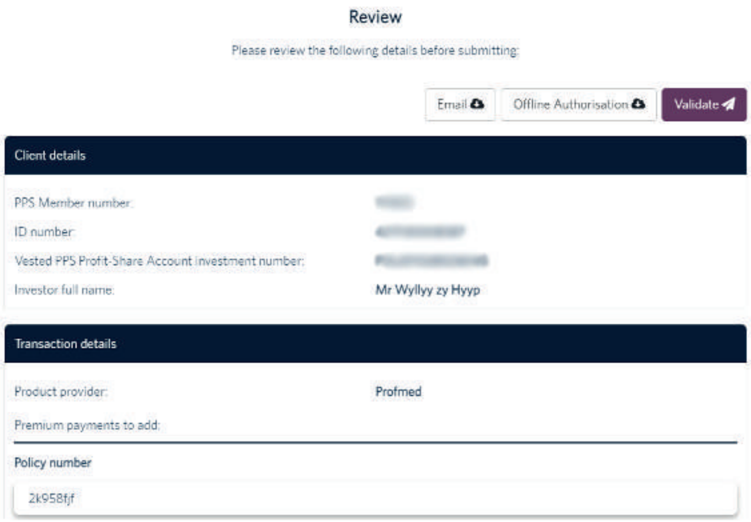
Select **"Add payment"** and click on the right-arrow

Note: Multiple policies from the same product provider may be added. Should an additional policy be added (from a different provider) then an additional case must be created to complete the transaction.

Step 3:
Input the policy information which will be funded by the Vested PPS Profit-Share Account.



Step 4:
Review that the client information is correctly captured.



Step 5: Client approval
Submit the transaction to the client for online or offline authorisation.

Once the client authorises, a copy of the authorised instruction will be emailed to the client and a case will be created with the authorised instruction attached.

Once the case is finalised, an automated communication will be sent to the client and will include the adviser in the email, as shown below.

Dear Dr Hoffman,

Thank you for the New Premium Payment instruction received.

Your request to implement the premium payment from your Vested Profit-Share Account investment has been processed.The request has also been submitted to PPS Short-Term Insurance to update the payment method accordingly.

You will be able to view premium payments made from your investment via our Secure Online Services.

Kind regards,

Need more information?
For supporting material, access the Vested PPS Profit-Share Account brochure and the Premium Payment brochure.

Did you know?
You can view the value of your client's Vested PPS Profit-Share Account on the PPS Investments Secure Site.

INVESTMENTS

For more information, speak to your Investment Specialist.

Contact information
0860 468 777
clientservices@ppsinvestments.co.za
www.pps.co.za