

## A new unit for a new era

Significant events, such as a change in leadership at the ruling party and shocking disclosures of what was happening at Steinhoff, marked the end of 2017. Both these events carry with it an important message about the integrity of leaders.

Within Momentum, 2018 kicked off with quite a bang as Nicolas Kruger, CEO of MMI Holdings, announced that he will be stepping down from this role in the middle of February 2018. His replacement, Hillie Meyer, is well-known and respected in Momentum, especially by those who have been with Momentum for a number of years and have worked with Hillie before. His appointment is complemented by the return of Jeanette Marais, who is equally well known at Momentum and in the financial services industry. We are ready to embrace a new era in MMI and Momentum's history.

Despite the fact that we are already in the second month of February 2018, I would like to wish you all a prosperous and successful 2018, also on behalf of the new unit, Financial Planning and Advice Solutions. The winds of change are also blowing in the financial planning environment in the form of economic challenges, political uncertainty and regulatory changes. Changes in legislation, impacting the way financial advisers will be expected to conduct their business in future, demanded that current structures and processes within the industry changed to respond to and address these.

Given its impact in the future, but also the opportunities for intermediaries and advisers, Momentum Retail established a dedicated unit to focus on these impacts and opportunities from one centralised area and to support the various distribution channels within Momentum. The establishment of the unit was formally announced in the latter week of February 2018.

The vision of Momentum Financial Planning and Advice Solutions is to be accountable for unique and consistent financial plans, advice and advice solutions throughout a client's financial wellness journey. A dedicated and skilled team provides the best possible financial planning processes, advice and tools to Momentum Financial Planning and Momentum Consult, while it is also responsible for providing legal support to Momentum Intermediary Solutions, including Momentum Distribution Services (MDS) and independent financial advisers.

Aligned to the capabilities listed above, a leadership team will ensure that we deliver on our strategic and operational objectives.

**Antoinette Roberts:** Operational and Coordination

**Estelle Scholtz-Mare:** Marketing

**Martiens Barnard:** Financial Wellness

**Paul Nixon:** Investments

**Sharon Teubes:** Legal Technical

**Wikus Lampen:** Regulatory and Governance



**Legal Advisers Momentum Financial Planning:**

Annemie Nieman  
Sanusha Naidoo  
Ulanda Weibach

**Momentum Consult and Momentum Intermediary Solutions**

Chris Weyer  
Denzil Ohlson  
Ivan Matee  
Rone Heymans  
Odette Kriel  
2 Vacancies

**Advisory Support Specialists**

Antoinette Janse van Rensburg  
April Maila  
Tabitha Garland  
Ingrid Pretorius

Estelle Borstlap (Marketing support) and Ben Fraser (Pace support) complete the team.

I regret to announce three resignations from the unit: Shivashni Bhogal (Legal Adviser KZN), Daniele Smit (Legal Adviser Gauteng) and Ronnie Bornman (Investment) will further their careers both in and outside of Momentum. I want to thank them for their contribution to us their colleagues, but also to Momentum, our financial advisers and intermediaries and wish them all well in the furthering of their respective careers.

As I wish you all of the best for the rest of 2018, I want to ensure you that we are committed to your success. I conclude with the words of Zig Ziglar:

**“One can get anything if he is willing to help enough others get what they want.”**

Kind regards

**Bertie Nel**  
Head : Momentum Financial Planning and Advice Solutions

