



# ASSURED INVESTMENT SOLUTIONS

An authorized financial services provider

*Helping you to protect & build your wealth.*

Dear Client

## **LETTER OF INTRODUCTION & CONTACT STAGE DISCLOSURES**

In complying with the FAIS legislation, I would like to bring the following information to your attention my contact details are stated below on this letterhead.

I am a Financial Advisor mandated by **Assured Investment Solutions**, an authorised Financial Services Provider, which accepts responsibility for my activities and is, licensed to render financial services.

I have been providing financial advice and intermediary services since – 1 July 2006 in the following areas of financial planning: -

Category	Sub Category	Category Description	Advice	Intermediary
1	1	Long-Term Insurance subcategory A	X	X
1	2	Short-Term Insurance Personal Lines	X	X
1	3	Long-Term Insurance subcategory B1	X	X
1	20	Long-term insurance subcategory B2	X	X
1	4	Long-Term Insurance subcategory C	X	X
1	5	Retail Pension Benefits	X	X
1	6	Short-Term Insurance Commercial Lines	X	X
1	7	Pension Funds Benefits	X	X
1	14	Participatory interests in a collective investment scheme	X	X
1	16	Health Service Benefits	X	X
1	21	Long-Term Insurance subcategory B2-A	X	X
1	22	Long-Term Insurance subcategory B1-A	X	X
1	23	Short-Term Insurance Personal Lines A1	X	X

My brokerage has written authority to market the products of the following product suppliers and I am accredited to market their products:

**Old Mutual, PPS Insurance, Sanlam, Liberty Life, Brightrock, Hollard Life, Momentum Life, Auto & General, Unity Insurance, Momentum Short term insurance, Bonitas Medical Fund, Discovery Health, Momentum Health, Stratum Gap insurance, Complimed Gap cover, Sanlam Gap Cover, Kagiso Asset Managers, Allan Gray Asset Managers, ECIA, Broker solutions and Capital Legacy .**

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Khaalid Kagee  
B. Com (Management)  
Independent Financial Advisor - IFA

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I **do not** hold more than 10% of the shares issued by any product supplier. I am remunerated for my services by being paid commission from the product supplier. I received more than 30% of my last year's commission and remuneration from the following product suppliers: Sanlam Life.

I do hold professional indemnity insurance.

Compliance with the FAIS Act is monitored by **Masthead (Pty) Ltd**, a compliance practice approved by the Financial Services Board.

Their postal address is PO Box 856, Howard Place, 7450. Their contact numbers are 021 686 3588(t) and 021 686 3589(f). I am a proud member of the Masthead Financial Advisors Association, which provides me with services such as a compliance, practice management and technology support by virtue of my membership.

This support helps me to provide you with a more professional service. The compliance service ensures that my business remains fully compliant with FAIS legislative requirements and therefore that you as customer receive sound financial advice. Through the practice management support, I can run a more professional business and therefore am able to provide you with an improved service and enhanced support.

I may from time to time receive non-cash incentives from product suppliers or indirect consideration from other persons. I will provide specific details should you request further information.

I wish to advise that all information obtained or acquired about you shall remain confidential unless you provide written consent, or unless I am required by any law to disclose such information.

If you are dissatisfied with any aspect of my service, you should address your complaint in writing to me at the address below. A copy of my Complaints Resolution Policy is available on request.

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**Khaalid Kagee**  
**B. Com (Management)**  
**Independent Financial Advisor - IFA**

**Office no:** 021- 6919964  
**Fax no:** 0866 203645  
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