

LETTER OF INTRODUCTION / INTERMEDIARY DISCLOSURE

As legislated by the Financial Advisory and Intermediary Services Act 2002 (FAIS), I am required to provide you with certain information relating to my professional financial planning services. I, **LEE STOCH**, am an Independent Financial Adviser, Principle in my practice, Key Individual and Representative licensed as a **FINANCIAL SERVICES PROVIDER** under license # **3526**.

I have been in practice since 1990. I have achieved a formal qualification and hold a Diploma in Business Management – July 1988. I have written and passed both of the Financial Sector Conduct Authority Regulatory Exams in 2011. My education within the Financial Service Industry is ongoing through Product Specific training; Class of Business training and Continuous Professional Development.

Please note that a copy of my license is available upon request. Additional information that I am required to provide you is recorded below.

FINANCIAL SECTOR CONDUCT AUTHORITY (FSCA)

The FSCA regulates the South African services industry and requires us to disclose certain information to you.

FINANCIAL SERVICES PRODUCTS

I am Category 1 licenced and entitled to render advice and intermediary services in respect of Long term insurance (Cat A,B,C), Short term insurance Personal and Commercial lines; Retail Pension Benefits; Pension Fund Benefits; Money Market instruments; Participatory interests in a collective investment scheme and Health service benefits.

CONTRACTS WITH PRODUCT SUPPLIERS

I hold a number of independent contracts with authorized Product Providers:

- ❖ **AMBLEDOWN GAP COVER**
- ❖ **BRIGHTROCK**
- ❖ **DISCOVERY HEALTH**
- ❖ **DISCOVERY INVEST**
- ❖ **DISCOVERY LIFE**
- ❖ **HOLLARD**
- ❖ **LIBERTY LIFE**
- ❖ **MEDSHIELD**
- ❖ **MOMENTUM/HEALTH/INVEST**
- ❖ **OLD MUTUAL**
- ❖ **SAFIRE**
- ❖ **SANLAM/GLACIER**
- ❖ **STANLIB UNIT TRUSTS**
- ❖ **STRATUM GAP COVER**
- ❖ **SIRAGO GAP COVER**

LEESURE ASSURANCE BROKERS IS NOT AN ASSOCIATED COMPANY OF ANY LIFE ASSURER OR PRODUCT PROVIDER

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3526. I have been in practice since November 2009. I have been in the industry since 1998. I have attained a Certificate in Financial Planning. I have written and passed both Financial Sector Conduct Authority Regulatory Exams in 2011. My education within the Financial Service Industry is ongoing through Product Specific training; Class of Business training and Continuous Professional Development.

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