

The Executive Brokers

FOR PEACE OF MIND INSURANCE

☎ 011 845 1850

📍 47 Sapphire Street, Farrarmere, Benoni, 1501

🌐 www.executivebrokers.co.za

Registered Financial Services Provider: FSP No 3966

DISCLOSURE NOTICE

Company Name: Pinfold Agencies (Pty) Ltd t/a The Executive Brokers

Registered Address: 47 Sapphire Street, Farrarmere, Benoni, 1501

Postal Address: Suite 163
Shop 37, Oakfield's Shopping Centre
Oak Street, Northmead Ext 4 Benoni 1501

Telephone Number: 011 845 1850

Email Address: admin@executivebrokers.co.za

Our License to Transact: FSP Number: 3966

Business as Financial Service Provider: **Categories of License:**

- Short term Personal
- Short term Business
- Medical Aid

Our insurance in place that provide protection to our clients:

Professional Indemnity

Insurer: Lombard Insurance Company
FSP 1596

Underwriters: Leppard & Associates
FSP 274

Fidelity Guarantee:

Insurer: Lombard Insurance Company
FSP 1596

Underwriters: Leppard & Associates
FSP 274

Our Compliance Officer:

Reldas Compliance

378 Central Park Road, Lynwood Pretoria
082 440 5151
liezl@reldas.co.za

Our Commitment to You:

As your trusted Brokers, Pinfold Agencies (Pty) Ltd t/a The Executive Brokers are committed to maintaining the highest standards of professionalism and integrity in handling your insurance matters. Please be assured of the following:

Confidentiality:	We will keep all information you provide us with strictly confidential and will not disclose it without your consent, except as required by law.
Document Integrity:	We will not alter any documents you provide when submitting them to insurers. If we identify any errors or issues with the documents, we will inform you and seek your approval before submission.
No Blank Signatures:	We will never ask you to sign blank documents. All documents, including proposals and claim forms, should be completed by you to ensure that all details are accurate and complete.
Preservation of Rights:	We are committed to upholding your rights in accordance with applicable legislation. We will never take actions that diminish or compromise your rights.
Access to Documents:	You are entitled to a copy of any documents used in the preparation of your insurance policies upon request, free of charge.
How We Get Paid:	We earn our income primarily through commissions from insurance providers for placing short-term insurance policies. We may also charge service fees for our advisory and brokerage services. Our focus is on providing you with tailored insurance solutions while maintaining transparency about how we are compensated.
Notification of Changes:	To ensure that your short-term insurance and medical aid coverage remains up-to-date and effective, please notify us immediately of any changes to your personal details or coverage needs. This includes:
Personal Details:	Any updates to your address, contact information, or personal status (e.g., marital status, dependents).
Coverage Changes:	Any modifications in your insurance needs or medical aid requirements, such as adjustments to your policy, changes in dependents, or changes in coverage preferences. Prompt notification helps us provide you with accurate and relevant service, ensuring that your policies are tailored to your current needs.

Claims Notification:

In the event of a claim related to your short-term insurance or medical aid coverage, it is your responsibility to notify us, immediately. Prompt notification is crucial to ensure timely and effective handling of your claim.

Please provide us with all relevant details and documentation as soon as you become aware of the claim. This will help us assist you efficiently and ensure that your claim is processed in accordance with your policy terms.

Short-term – claims@executivebrokers.co.za

Medical Aid / Gap cover: morgan@executivebrokers.co.za or admin@executivebrokers.co.za

For any complaints:

Contact person

Marlene Krause (Director)

Email address

marlene@executivebrokers.co.za

The category of products and/or services we are mandated to supply on behalf of the Insurer:

Products

FSP: 3966 Pinfold Agency t/a The Executive Brokers (PTY) Ltd
Advice and Intermediary Services

Products				
Category	Advice - Automated	Advice - Non-automated	Intermediary - Scripted	Intermediary - Other
CATEGORY I		31/07/2023		31/07/2023
Short-Term Insurance Personal Lines		15/09/2004		15/09/2004
Long-Term Insurance subcategory B1		31/07/2023		31/07/2023
Short-Term Insurance Commercial Lines		15/09/2004		15/09/2004
Health Service Benefits		06/07/2022		06/07/2022
Short-term Insurance Personal Lines A1		15/09/2004		15/09/2004

Mandate on all the below:**Written Mandate****Product Suppliers:****Short Term**

Santam
Old Mutual
Cross Country
Mua
Elite
Quicksure
OneSure
Firedart Engineering
Vanguard Marine Insurance
Vantage Insurance Acceptances
CIB
Auto & General

Medical

Momentum Health
Discovery
Bestmed Health

Details about Your Insurer and Our relationship with them

Pinfold Agencies (Pty) Ltd t/a The Executive Brokers act independently from any of the above-mentioned product suppliers and as such the product supplier will not accept responsibility for the actions of Pinfold Agencies (Pty) Ltd t/a The Executive Brokers.

We do not hold directly or indirectly more than 10% of the relevant product supplier's shares, nor have any equivalent substantial financial interest in any of the above-mentioned product suppliers.

We Do not receive more than 80% of our total remuneration, including commission, from one specific product supplier.

Conflict of interest

This FSP has implemented a Conflict-of-Interest Management Policy. The FSP might on occasion receive gifts/prizes from Product Providers, the details of which are contained in the Gift register and available for your perusal.

Treating Customers Fairly

This FSP as embedded the "Treating Customers Fairly" requirements onto the culture of the Organization and it is supported by various policies and procedures.

National Financial Ombudsman Scheme Of South Africa (NFOSA)

Johannesburg

110 Oxford Rd, Houghton Estate, Johannesburg, Gauteng, 2198

Cape Town

Claremont Central Building, 6th Floor, 6 Vineyard Road, Claremont, Western Province, 7700

Telephone number: 0860-800-900

Email address: info@nfosa.co.za

Website address: www.nfosa.co.za

FAIS OMBUDSMAN

Physical Address:

Menlyn Central Office Building

125 Dallas Avenue, Waterkloof Glen, Pretoria, 0010

Postal Address:

P O Box 41, Menlyn Park, 0063

Telephone Number:

012 762 5000

Sharecall:

086 066 3274

Email Address:

info@faisombud.co.za

Website:

www.faisombud.co.za