

<Owner Title> <Owner Initial> <Owner Surname>

<Address Line 1>

<Address Line 2>

<Address Line 3>

<Postal Code>

<System date>

Investment: <Product>

Investment number: <Policy number>

Dear <Owner Title> <Owner Surname>

### **You may be at risk of losing your benefit**

We've identified that you may be at risk of losing your Retirement Investment Integrator on your <Global> Discovery Retirement Optimiser (DRO). The Retirement Investment Integrator gives you tiered discounts of up to 100% on all your fees. However, this only applies if your <Dollar> Life Plan premium is above the minimum to qualify for this benefit. We update this minimum qualifying amount annually in line with average <Dollar> Life Plan premium increases. Currently, you're receiving a discount of <x>% on all your fees through this benefit.

Your current <Dollar> Life Plan premium is <R><\$><insert amount>. At your next <Dollar> Life Plan anniversary on <insert date>, the minimum for the Retirement Investment Integrator will increase to <R><\$><insert amount>. To keep your fee discount, your <Dollar> Life Plan premium must increase above this new minimum on your next <Dollar> Life Plan anniversary.

### **Contact us**

For more information, please contact your financial adviser or go to our website. You can also call us on 0860 67 57 77 or email us at [invest\\_support@discovery.co.za](mailto:invest_support@discovery.co.za). We send you this letter only as information and you must not take the information as financial advice. For personalised financial advice, please contact your financial adviser.

Regards



Lance Geysler

**Chief Operating Officer**

**Discovery Invest**

Your financial adviser's details:

<Financial adviser's name/s> <Financial adviser's surname>

<Intermediary House>

Cellphone: <Financial adviser's cellphone number>

Email: <Financial adviser's email address>

<Franchise name>

**FAIS notice and disclaimer**

This letter is meant as information and must not be taken as financial advice. For tailored financial advice, please contact your financial adviser. Figures provided are correct at the time of writing this letter. While every care has been taken to ensure accuracy, Discovery is not liable for any actions taken by any person based on the correctness of this information. For full details on the products, benefits and any conditions, please refer to the relevant brochure or fact file.

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