

WHERE TECHNOLOGY MEETS REAL PEOPLE – THE TRUSTEES' DILEMMA

momentum
consultants & actuaries



A MULTI-GENERATIONAL WORKFORCE



2018: 1%

2018: 18%

2018: 28%

2018: 52%

2018: 1%



Silent Generation
1928 – 1945

Baby Boomers
1946 – 1964

Generation X
1965 – 1980

Generation Y
(Millennials)
1981 – 1996

Generation Z
After 1996

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THE LIFE JOURNEY OF THE FUTURE WORKFORCE

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The rise of the Millennials

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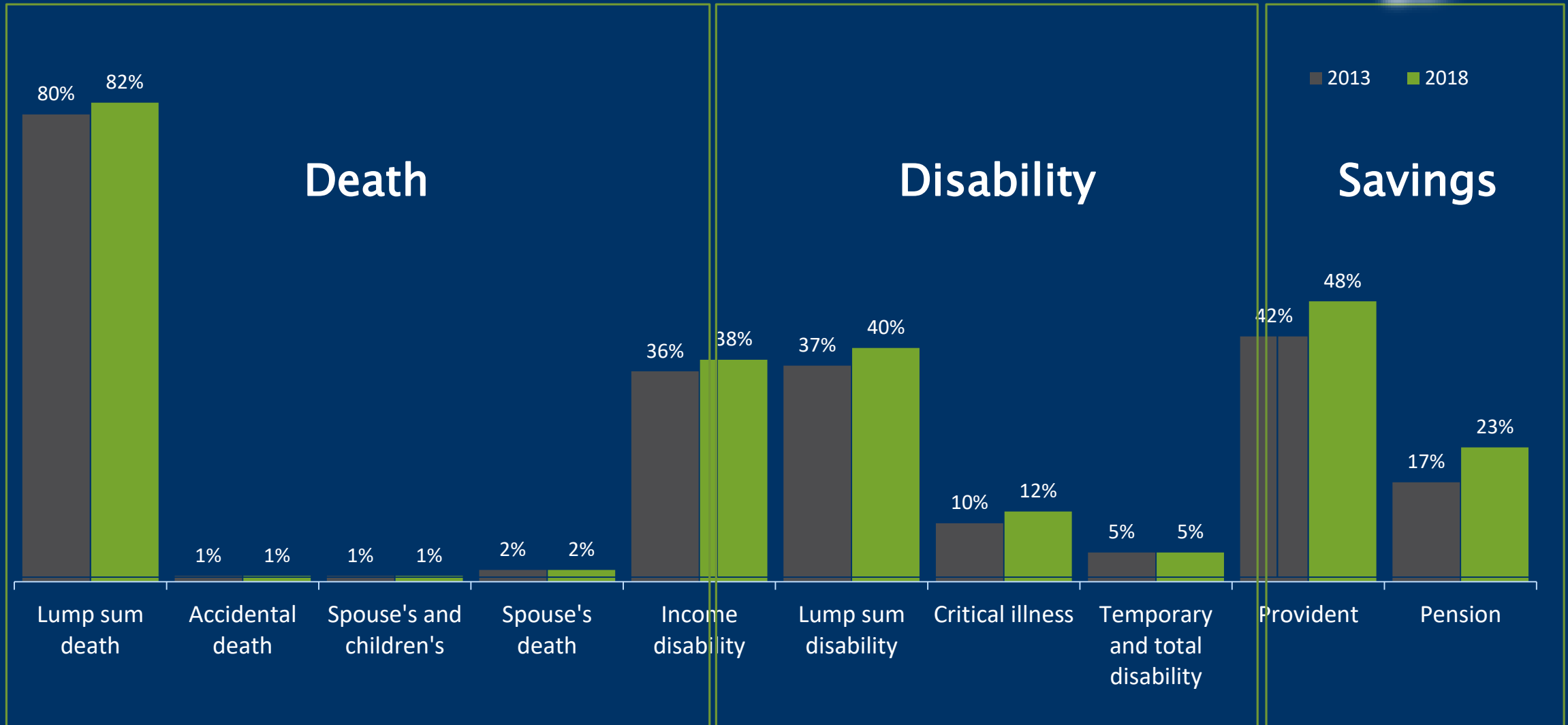


CHARACTERISTICS OF THE FUTURE WORKFORCE

- Financial vulnerability
- Lacks financial literacy and don't understand their benefits
- Want to be engaged differently
- Have different priorities

*This future
workforce
sees
retirement
differently*

EMPLOYEE BENEFITS HAVE NOT CHANGED





Getting here will
require different
thinking!

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*INSANITY IS DOING THE SAME THING
OVER AND OVER AGAIN AND
EXPECTING A DIFFERENT RESULT*

–ALBERT EINSTEIN



The Trustees' dilemma

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USING TECHNOLOGY TO SOLVE THE TRUSTEES' DILEMMA

REAL PEOPLE VS A VIRTUAL SIMULATED WORLD

WHERE TECHNOLOGY MEETS REAL PEOPLE



- You need to make sure that the real needs of your members are taken care of during and before retirement.
- The world has changed and keeps changing
- Members' needs have changed and keeps changing
- A traditional fund consultant won't do
- Need an expert team of unbiased and trusted consultants
- A fresh approach to advice, technology and solutions

R15
000

Manufacturing
industry

EBnet

6 Years

Only
8%
preserve

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YOU NEED SMARTER ADVICE



- Fund analytics tool provides valuable member behaviour and progress insights
- Better decisions for your members
- Advice process to helps members better articulate their needs
- Tailor made interventions to positively influence member behavior

**By using technology we can scale the delivery of
semi-personal individual advice**

SMARTER ADVICE IS HOLISTIC



Risk cover needs



Investment needs



Healthcare funding



Engagement



Member engagement =
member insight =
changed behaviour

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TRUSTEES' SOLUTION



- How do you solve your dilemma?

By partnering with a pioneering fund consultant that thinks about advice completely different and using appropriate technology responsibly to meet the real needs of your members



THANK YOU

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