

Old Mutual Retirement Fund Administration



Web Registration Guide for SuperFund Member Web

DO GREAT THINGS



OLDMUTUAL

Your Step-By-Step Registration Guide to the Retirement Scheme Administration Web

This guide is specifically designed for Retirement Scheme Administration services. Should you wish to register for other services, please consult the online guides that cater for those services.

There are two steps to getting started. It is important for you to complete both steps.

Step 1: Register for Old Mutual's Online Services

Step 2: Apply for access to the applicable Retirement Scheme Administration service

You will need the following

1. Your Identity Number (this could be a RSA ID, a non-RSA ID, a Passport Number, a Social Security Number or a British National Insurance Number)
2. Your client number. This is the number assigned to you by Old Mutual via e-mail or the post.

Contact us

If you need assistance at any point during the process, simply contact the relevant Support Centre:

For assistance with step 1

Within South Africa: 0860 60 65 00
Outside South Africa: +27 21 503 1710
E-mail: help-secure@oldmutual.com

For assistance with step 2

Within South Africa: 0860 20 30 40
Outside South Africa: +27 21 509 1006
E-mail: rfamembers@oldmutual.com

For technical assistance if you are already registered and have access

Within South Africa: 0860 009 009
Outside South Africa: +27 21 509 0007
E-mail: pss@oldmutual.com

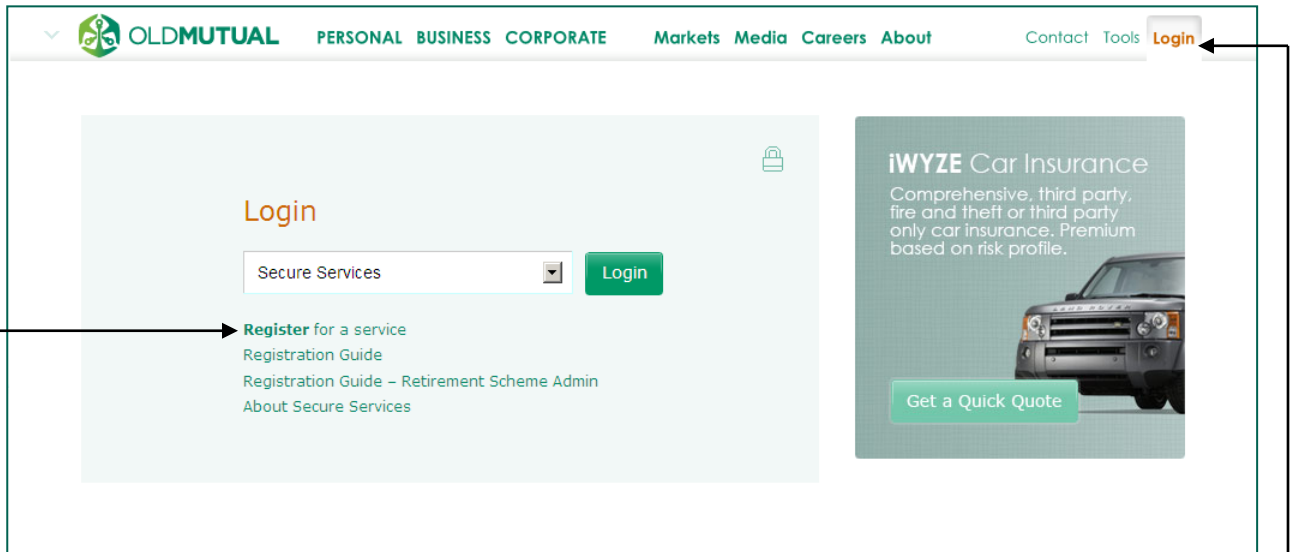


Queries will be attended to between 08h00 and 17h00 (SAST).

Step 1: Registration

If you have already registered for one of Old Mutual's online services and have a user number, proceed to step 2.

1. Go to the Old Mutual website home page



- Go to <http://www.oldmutual.co.za> and click on **Login**
- On the Old Mutual Secure Services Login page click on **Register for a service**.

2. Supply your personal details

OLD MUTUAL

24 June 2013 12:34:30 AM (GMT+2)

Login Register Terms & Conditions Help Contact Us

SECURE SERVICES | REGISTER

PERSONAL DETAILS

Please note that fields marked with a "*" are required.

Title:*

Initial(s):*

Name(s):*

Surname:*

Date of birth:*

Daytime telephone number:* (code and number)

Work telephone number: (code and number)

Cellphone number: (number)

ID type:*

ID number:*

Email address:*

Confirm email address:*

I have read and accept the [Legal terms and conditions](#)

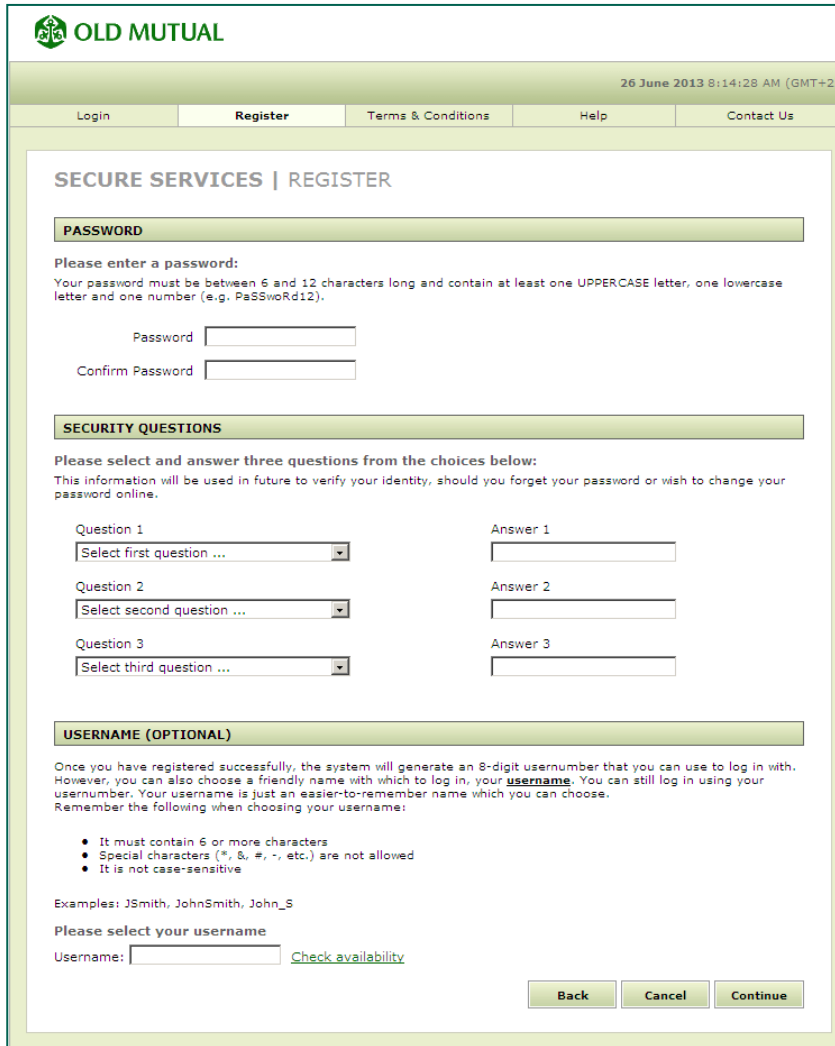
ACCESS TO MYPORTFOLIO

MyPortfolio gives you access to detailed and up-to-date information on all your Old Mutual policies and investments via the Internet.

I would like to register to view my [Old Mutual portfolio](#)

- The mandatory fields must be completed, although we encourage you to complete all the fields.
- Read and accept the **Legal Terms and Conditions**
- **Note:** Access to MyPortfolio provides you with access to other investments you may hold with Old Mutual. Please **do not** tick the box to register for these services at this stage.

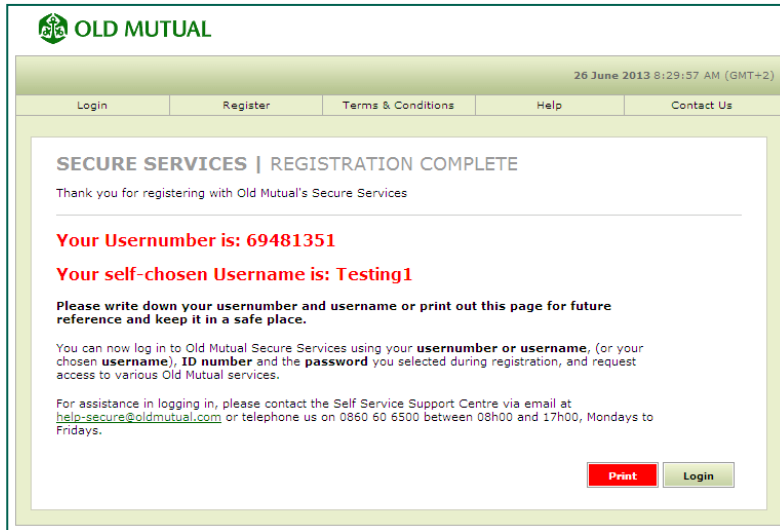
3. Select a password and answer security questions



The screenshot shows the 'REGISTER' page on the Old Mutual website. At the top, there is a navigation bar with links for 'Login', 'Register', 'Terms & Conditions', 'Help', and 'Contact Us'. The main heading is 'SECURE SERVICES | REGISTER'. The page is divided into three sections: 'PASSWORD', 'SECURITY QUESTIONS', and 'USERNAME (OPTIONAL)'. The 'PASSWORD' section includes instructions on password requirements (6-12 characters, uppercase, lowercase, and number) and two input fields for 'Password' and 'Confirm Password'. The 'SECURITY QUESTIONS' section asks the user to select and answer three questions from a list, with dropdown menus for questions and text boxes for answers. The 'USERNAME (OPTIONAL)' section explains that a system-generated 8-digit usernumber is available, but users can also choose a friendly 'username'. It lists rules for usernames (6+ characters, no special characters, case-insensitive) and provides examples like 'JSmith', 'JohnSmith', and 'John_S'. There is a 'Check availability' link and a 'Username:' input field. At the bottom right, there are 'Back', 'Cancel', and 'Continue' buttons.

- You have the option to choose your own username or make use of the system generated usernumber. Your username needs to be unique.
- You can verify your username by clicking on the “**Check availability**” link.
- **Note:** The password is case-sensitive.

4. Usernumber confirmation



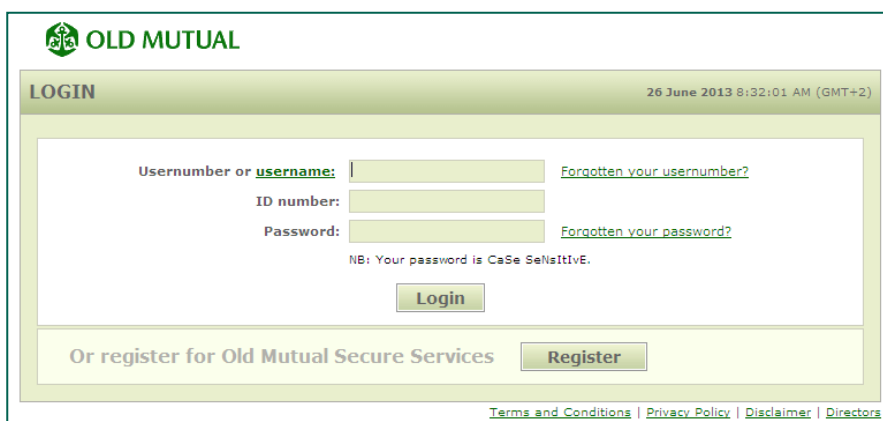
The screenshot shows the 'SECURE SERVICES | REGISTRATION COMPLETE' page. It features the Old Mutual logo at the top left and a navigation menu with 'Login', 'Register', 'Terms & Conditions', 'Help', and 'Contact Us'. The main content area includes a thank-you message, the user's unique user number (69481351), and their self-chosen username (Testing1). It also provides instructions on how to use these credentials for login and offers contact information for support. At the bottom right, there are 'Print' and 'Login' buttons.

- This page displays your unique usernumber and your username if you selected one.
- You will need this usernumber or username every time you login to Old Mutual's Online Services.

5. You have now successfully completed **Step 1**. To proceed, click on **Login**. Alternatively, go to <https://secure.ssa.oldmutual.co.za/login/login.asp>

Step 2: Apply for access to a specific service

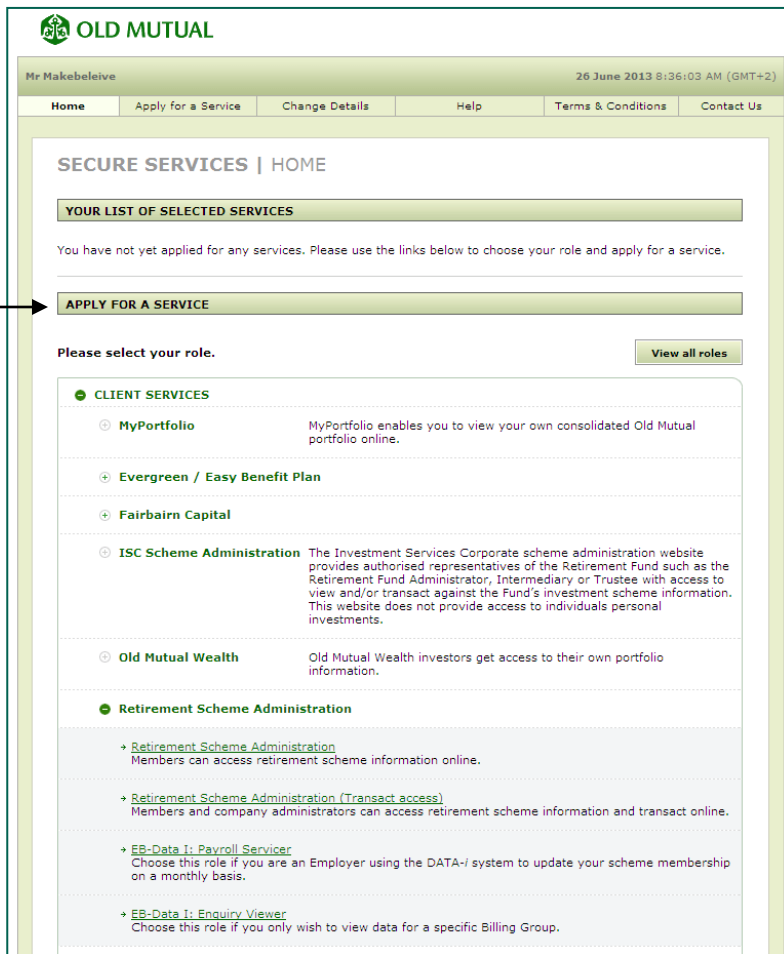
1. Log in



The screenshot shows the 'LOGIN' page. It features the Old Mutual logo at the top left and a navigation menu with 'Login', 'Register', 'Terms & Conditions', 'Help', and 'Contact Us'. The main content area includes a login form with fields for 'Usernumber or username', 'ID number', and 'Password'. There are links for 'Forgotten your usernumber?' and 'Forgotten your password?'. A note states 'NB: Your password is CaSe SeNsItIvE.'. At the bottom, there is a 'Login' button and a link to 'Or register for Old Mutual Secure Services' with a 'Register' button. At the very bottom, there are links for 'Terms and Conditions', 'Privacy Policy', 'Disclaimer', and 'Directors'.

- Enter your usernumber or username, ID number and the password you chose during registration. Click on **Login** to continue.

2. Select a service



- On the home page, under the heading 'Apply for a service',
 - (a) select **Client Services**
 - (b) then select **Retirement Scheme Administration**
 - (c) from the drop-down list, select as follows:
 - **Retirement Scheme Administration** - Select this service if you want to view your account balance and membership information.

3. Service specific details

Mr Makebeleive 26 June 2013 12:39:59 AM (GMT+2)

Home Apply for a Service Change Details Help Terms & Conditions Contact Us

SECURE SERVICES | APPLY FOR A SERVICE

SUPPLY DETAILS - RETIREMENT SCHEME ADMINISTRATION | TRANSACT

Please enter your client number:

Please note that only a unique client number communicated to you personally in writing will be accepted here. Should you not have received a letter advising you of your client number you will not be granted access to this on-line administration facility. Where you have not received such a letter, then please continue to use your existing method of communication with regard to matters relating to your retirement vehicle.

Back Cancel Continue

- Enter your client number on this screen, as provided to you via e-mail or the post.
- Click on **Continue** to complete the process.
- **Note:** This is **not** your 8-digit Usernumber or Member Number (e.g. A123456B). Your application will not be approved if you use it here.

4. Activation of your service

Mr Makebeleive 26 June 2013 8:40:58 AM (GMT+2)

Home Apply for a Service Change Details Help Terms & Conditions Contact Us

SECURE SERVICES | APPLICATION COMPLETE

We are currently processing your request to access this service. Upon successful authorisation, we will send you an email confirming that your access to this service has been granted.

Return to the [Secure Services Home Page](#) to track the progress of your application.

- Your application is now complete.
- As part of ensuring your online security, we need to verify your details.
- If you have applied for Retirement Scheme Administration and your application is successful, you will receive an email within 24 hours confirming that access to the service has been granted.

5. Applying for more than one service

If you need to apply for another service, go back to the Secure Services Home Page and follow the registration process from point 2 under step 2 (Select a service).

