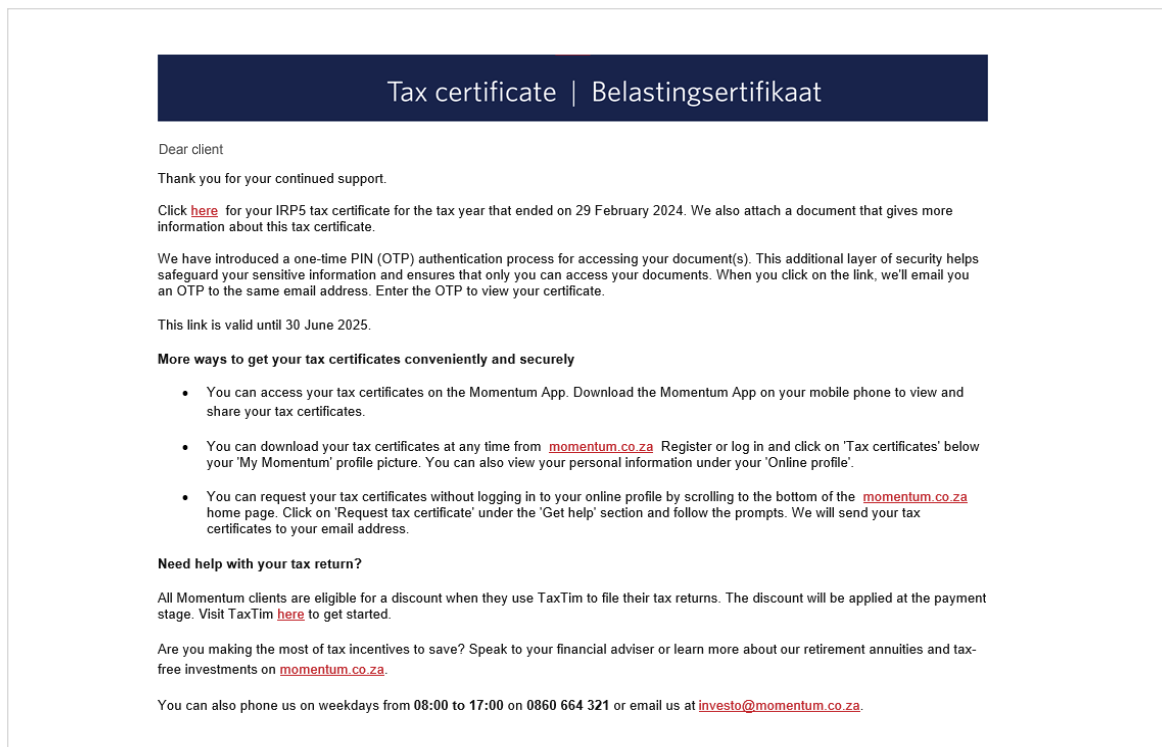


## This year, internet safety is top of mind when we send clients' tax certificates

Here's how your clients will receive their tax certificates – for Momentum Investments, Momentum Retail (Investo and MMerge), and Momentum Money – this year.

### 1 Client receives an email with a link in the email body

A screenshot of an email titled "Tax certificate | Belastingcertifikaat". The email content includes a greeting, a thank you, a link to the tax certificate, a notice about a new one-time PIN (OTP) authentication process, a list of ways to access tax certificates, and contact information for help.

**Tax certificate | Belastingcertifikaat**

Dear client

Thank you for your continued support.

Click [here](#) for your IRP5 tax certificate for the tax year that ended on 29 February 2024. We also attach a document that gives more information about this tax certificate.

We have introduced a one-time PIN (OTP) authentication process for accessing your document(s). This additional layer of security helps safeguard your sensitive information and ensures that only you can access your documents. When you click on the link, we'll email you an OTP to the same email address. Enter the OTP to view your certificate.

This link is valid until 30 June 2025.

**More ways to get your tax certificates conveniently and securely**

- You can access your tax certificates on the Momentum App. Download the Momentum App on your mobile phone to view and share your tax certificates.
- You can download your tax certificates at any time from [momentum.co.za](https://momentum.co.za). Register or log in and click on 'Tax certificates' below your 'My Momentum' profile picture. You can also view your personal information under your 'Online profile'.
- You can request your tax certificates without logging in to your online profile by scrolling to the bottom of the [momentum.co.za](https://momentum.co.za) home page. Click on 'Request tax certificate' under the 'Get help' section and follow the prompts. We will send your tax certificates to your email address.

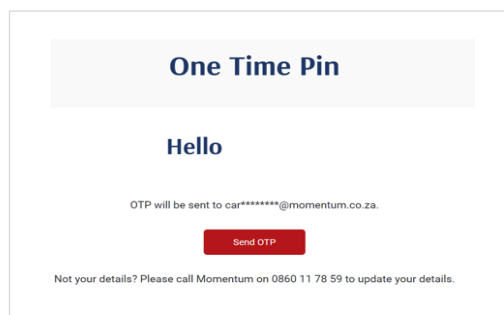
**Need help with your tax return?**

All Momentum clients are eligible for a discount when they use TaxTim to file their tax returns. The discount will be applied at the payment stage. Visit TaxTim [here](#) to get started.

Are you making the most of tax incentives to save? Speak to your financial adviser or learn more about our retirement annuities and tax-free investments on [momentum.co.za](https://momentum.co.za).

You can also phone us on weekdays from 08:00 to 17:00 on 0860 664 321 or email us at [investo@momentum.co.za](mailto:investo@momentum.co.za).

### 2 After clicking on the link, your browser will display the following screen that will allow you to request an OTP

A screenshot of a web page titled "One Time Pin". The page displays a greeting, a message indicating that an OTP will be sent to a specific email address, a "Send OTP" button, and a footer with contact information.

**One Time Pin**

Hello

OTP will be sent to car\*\*\*\*\*@momentum.co.za.

[Send OTP](#)

Not your details? Please call Momentum on 0860 11 78 59 to update your details.



Dear Client

To access your document(s), we have introduced a one-time PIN (OTP) authentication process. This additional layer of security helps safeguard your sensitive information and ensures that only an authorised person can access documents.

Please use the following OTP to access the document(s):

**465534**

Please note that the OTP is valid for **5 minutes** only.

You can contact us [here](#) for more information.

If you have received this email in error, please let us know.

Kind regards

**Momentum**

Here for your journey to success

### 3 The client fills in the OTP in the blocks provided

One Time Pin

Hello

OTP has been sent.

Enter the OTP sent to your device to view your document:

Submit Resend OTP

### 4 The tax certificate opens for the client to download and/or print

**momentum**

**PAYE IRP5 tax certificate**

Year of assessment 2024      Transaction year 2024      Period of reconciliation 202402

Name of investment owner/fund member  
Contract number  
Fund/Insurer  
Identity/Passport number  
Income tax number  
Certificate number

SARS source code	Amount (R)
<b>Income</b>	
<b>Deductions</b>	

Disclaimer

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