

Business Name

Old Mutual Investment Administrators (FSP 26/10/542)

Business Overview

Old Mutual Investment Administrators (Pty) Ltd t/a BoE Investment Administrators offers both linked product investments and employee benefits to the South African market. This offering provides a comprehensive range of sophisticated and innovative financial products and services. These span the entire spectrum from providing individual investment choice for clients invested in preservation funds, retirement annuities, living pensions or discretionary investments, to establishing, managing and administering company pension and provident funds.

FAIS Licence

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| Licensed Entity | Old Mutual Investment Administrators (Pty) Ltd | |
| Business Areas covered by the licence (where applicable) | N/A | |
| Licence Category | Category III | |
| Licence Subcategories (Incl. Advice and intermediary service applicability) | Long-term Insurance: Category A | |
| | Short-term Insurance: Personal Lines | |
| | Long-term Insurance: Category B | |
| | Long-term Insurance: Category C | X |
| | Retail Pension Benefits | X |
| | Short-term Insurance: Commercial Lines | |
| | Pension Fund Benefits (excluding retail pension benefits) | X |
| | Securities and Instruments: Shares | |
| | Securities and Instruments: Money market instruments | X |
| | Securities and Instruments: Debentures and securitised debt | |
| | Securities and Instruments: Warrants, certificates and other instruments | |
| | Securities and Instruments: Bonds | |
| | Securities and Instruments: Derivative instruments | |
| | Participatory interests in Collective Investment Schemes | X |
| | Foreign currency denominated investment instruments | |
| Health Service Benefits | | |
| Deposits as defined in the Banks Act – exceeding 12 months | | |
| Deposits as defined in the Banks Act – 12 months or less | | |
| FSP Contact Number | 0860 22 66 06 | |
| FSP Fax Number | (021) 504 8308 | |
| FSP E-Mail Address | clientservicesia@oldmutual.com | |
| FSP Compliance Department Contact Details | <p>Connie Smit</p> <p>Old Mutual Investment Administrators (Pty)Ltd 5th Floor, Mutual Park Jan Smuts Drive Pinelands 7405</p> <p>PO Box 5408 Cape Town 8000</p> <p>Tel 021 504-7167 Fax 021 504-8308</p> <p>E-mail: connies@oldmutual.com</p> | |
| FSP Complaints Department Contact Details | <p>Connie Smit</p> <p>Old Mutual Investment Administrators (Pty)Ltd 5th Floor, Mutual Park Jan Smuts Drive Pinelands 7405</p> <p>PO Box 5408 Cape Town 8000</p> <p>Tel 021 504-7167 Fax 021 504-8308</p> <p>E-mail: connies@oldmutual.com</p> | |