



# GROUP TAKE-ON APPLICATION

Email: [newapplication@medshield.co.za](mailto:newapplication@medshield.co.za)

Please complete in black ink. Print clearly using capital letters. Only one character per block. Leave one block between words. Mark with an X where necessary. All sections must be completed.

**Selection of Benefit Option:** \_\_\_\_\_

This form needs to be submitted to the Scheme by the 14th of the month for a join date of the following month.

Start Date of Membership:

## CONSULTANT DECLARATION

Broker Code:

## DOCUMENT CHECKLIST

In order to avoid rejection of your application please provide the following documents:	Please Tick
ID copy(ies) for all beneficiaries (e.g. ID/birth certificate/passport)	
Student(s) (child dependant age 21-27 that is studying or turning 21 in the next 3 months) <ul style="list-style-type: none"><li>• Proof of registration at a recognised tertiary institution</li></ul>	
Proof of previous medical scheme (certificate of membership reflecting an end date)	
Stamped bank statement or stamped confirmation letter from the bank not older than 3 months	
Additional documents for Special Dependants (foster/adopted children, niece, nephew, sibling, grandchild):  <b>Adopted/Foster Child:</b> <ul style="list-style-type: none"><li>• Legal documentation of adoption or foster arrangement</li></ul> <b>A parent or grandparent of the Principal Member:</b> <ul style="list-style-type: none"><li>• Certified affidavit from Principal Member confirming residency, employment status and income of parent / grandparent</li><li>• Proof of income such as payslip, bank statement, or proof of pension</li></ul> <b>A grandchild, niece, nephew, or sibling:</b> <ul style="list-style-type: none"><li>• Certified affidavit from Principal Member and parent(s) confirming residency, employment, and income of child and both parents</li><li>• Proof of income if dependant is employed</li></ul>	

I, \_\_\_\_\_ hereby understand that it is an offense to submit fraudulent business and I have explained Non-disclosure, General and condition specific waiting periods, Late Joiner Penalty, PMB and proration of benefits to the applicant. I further declare that I have attached all documents as per the document checklist above to this application form, and that the application form is submitted to the Scheme within 30 calendar days of the member declaration sign date.

Consultant Signature: \_\_\_\_\_

Date:

**SECTION A****PRINCIPAL MEMBER DETAILS** (attach copy of ID document)

Title:	<input type="text"/>	Initials:	<input type="text"/>
First Names:	<input type="text"/>		
Surname:	<input type="text"/>		
ID/Passport Number:	<input type="text"/>		
Date of Birth:	<input type="text"/>	<input type="text"/>	
Postal Address:	<input type="text"/>		
	<input type="text"/>		
Postal Code:	<input type="text"/>	<input type="text"/>	
Physical Address:	<input type="text"/>		
	<input type="text"/>		
Postal Code:	<input type="text"/>	<input type="text"/>	

Please provide at least one email address

Personal Email Address:	<input type="text"/>
Business Email Address:	<input type="text"/>
Telephone Number (W):	<input type="text"/>
Telephone Number (H):	<input type="text"/>
Cell Number:	<input type="text"/>
Fax Number:	<input type="text"/>
Tax Number:	<input type="text"/>

Please complete for marketing purposes

Gender: (Mark with an X)	<input type="checkbox"/> M	<input type="checkbox"/> F	Marital Status:	<input type="checkbox"/> Single	<input type="checkbox"/> Married	<input type="checkbox"/> Divorced	<input type="checkbox"/> Widowed
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Please complete for statistical purposes. If you do not wish to disclose your dependant's race, please mark the relevant box with an X.

Race:	<input type="checkbox"/> African	<input type="checkbox"/> Caucasian/ White	<input type="checkbox"/> Coloured	<input type="checkbox"/> Indian	<input type="checkbox"/> Asian	<input type="checkbox"/> Other
I do not wish to disclose:	<input type="checkbox"/>					

For special dependants (e.g. parents, foster/adopted children, niece, nephew, grandchild, parents) please attach the following:

**Adopted/Foster Child:**

Legal documentation of adoption or foster arrangement

**A parent or grandparent of the Principal Member:**

- Certified affidavit from Principal Member confirming residency, employment status and income of parent/grandparent
- Proof of income such as payslip, bank statement, or proof of pension

**A grandchild, niece, nephew or sibling:**

- Certified affidavit from Principal Member and parent(s) confirming residency, employment, and income of child and both parents
- Proof of income if dependant is employed

If the dependant is classified as a student and falls within the age range of 21 to 27 or will reach the age of 21 in the next three months, student proof in the form of a stamped or signed letter, on a letterhead from the accredited institution for tertiary education for the current year must accompany this form.

Include copies of the dependants' ID, birth certificate or passport.

Acceptance of dependants will be in accordance with the Rules of the Scheme.

**Dependant 1**

Name of Dependant:

Surname: (If Different to Principal Member)

ID Number/Passport number for non-South Africans citizens:

Date of Birth:

Dependant Email Address:

Dependant Cell Number:

Relationship to Principal Member:

Gender: (Mark with an X)

Name of Dependant:				
Surname: (If Different to Principal Member)				
ID Number/Passport number for non-South Africans citizens:				
Date of Birth:				
Dependant Email Address:				
Dependant Cell Number:				
Relationship to Principal Member:				
M	F	Adult Over 21: (Mark with an X)	Y	N

If the dependant is classified as a special dependant (e.g. parents, adopted/foster child, niece, nephew, sibling, grandchild), please answer the following compulsory questions:

Is the dependant reliant on you for family care and support?

Y	N
Y	N

Does the dependant live with you?

If the dependant is an adult, does the dependant earn a monthly income e.g salary, pension?

If yes, what is the monthly income?

R

Please complete for statistical purposes. If you do not wish to disclose your dependant's race, please mark the relevant box with an X.

Race:

African	Caucasian/ White	Coloured	Indian	Asian	Other
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I do not wish to disclose:

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**Dependant 2**

Name of Dependant:

Surname: (If Different to Principal Member)

ID Number/Passport number for non-South Africans citizens:

Date of Birth:

Dependant Email Address:

Dependant Cell Number:

Relationship to Principal Member:

Gender: (Mark with an X)

M

F

Adult Over 21: (Mark with an X)

Y

N

If the dependant is classified as a special dependant (e.g. parents, adopted/foster child, niece, nephew, sibling, grandchild), please answer the following compulsory questions:

Is the dependant reliant on you for family care and support?

Y

N

Does the dependant live with you?

Y

N

If the dependant is an adult, does the dependant earn a monthly income e.g salary, pension?

If yes, what is the monthly income?

R

Please complete for statistical purposes. If you do not wish to disclose your dependant's race, please mark the relevant box with an X.

Race:

African

Caucasian/  
White

Coloured

Indian

Asian

Other

I do not wish to disclose:

**Dependant 3**

Name of Dependant:

Surname: (If Different to Principal Member)

ID Number/Passport number for non-South Africans citizens:

Date of Birth:

Dependant Email Address:

Dependant Cell Number:

Relationship to Principal Member:

Gender: (Mark with an X)

M

F

Adult Over 21: (Mark with an X)

Y

N

If the dependant is classified as a special dependant (e.g. parents, adopted/foster child, niece, nephew, sibling, grandchild), please answer the following compulsory questions:

Is the dependant reliant on you for family care and support?

Y

N

Does the dependant live with you?

Y

N

If the dependant is an adult, does the dependant earn a monthly income e.g salary, pension?

If yes, what is the monthly income?

R

Please complete for statistical purposes. If you do not wish to disclose your dependant's race, please mark the relevant box with an X.

Race:

African

Caucasian/  
White

Coloured

Indian

Asian

Other

I do not wish to disclose:

**Dependant 4**

Name of Dependant:

Surname: (If Different to Principal Member)

ID Number/Passport number for non-South Africans citizens:

Date of Birth:

Dependant Email Address:

Dependant Cell Number:

Relationship to Principal Member:

Gender: (Mark with an X)

M

F

Adult Over 21: (Mark with an X)

Y

N

If the dependant is classified as a special dependant (e.g. parents, adopted/foster child, niece, nephew, sibling, grandchild), please answer the following compulsory questions:

Is the dependant reliant on you for family care and support?

Y

N

Does the dependant live with you?

Y

N

If the dependant is an adult, does the dependant earn a monthly income e.g salary, pension?

If yes, what is the monthly income?

R

Please complete for statistical purposes. If you do not wish to disclose your dependant's race, please mark the relevant box with an X.

Race:

African

Caucasian/  
White

Coloured

Indian

Asian

Other

I do not wish to disclose:

**Dependant 5**

Name of Dependant:

Surname: (If Different to Principal Member)

ID Number/Passport number for non-South Africans citizens:

Date of Birth:

Dependant Email Address:

Dependant Cell Number:

Relationship to Principal Member:

Gender: (Mark with an X)

M

F

Adult Over 21: (Mark with an X)

Y

N

If the dependant is classified as a special dependant (e.g. parents, adopted/foster child, niece, nephew, sibling, grandchild), please answer the following compulsory questions:

Is the dependant reliant on you for family care and support?

Y

N

Does the dependant live with you?

Y

N

If the dependant is an adult, does the dependant earn a monthly income e.g salary, pension?

If yes, what is the monthly income?

R

Please complete for statistical purposes. If you do not wish to disclose your dependant's race, please mark the relevant box with an X.

Race:

African

Caucasian/  
White

Coloured

Indian

Asian

Other

I do not wish to disclose:

## SECTION C

### FAMILY PRACTITIONER (FP) NOMINATION – MediPhila, MediCurve, MediValue Compact and MediPlus Compact

If you have selected MediPhila, MediCurve or one of the Compact options, it is compulsory for you and your dependants to nominate a Family Practitioner (FP). If you do not nominate a FP as per the criteria listed per option below, your application form will not be processed by the Scheme.

**MediPhila:** Each beneficiary MUST nominate only ONE (1) Family Practitioner from the MediPhila Family Practitioner Network to a maximum of two (2) Family Practitioners per family.

**MediCurve:** Each beneficiary must nominate only ONE (1) Family Practitioner from the MediCurve Family Practitioner (FP) Network.

**MediValue Compact and MediPlus Compact:** Each beneficiary MUST nominate ONE (1) Family Practitioner (FP) which MUST be from the Compact Family Practitioner (FP) Network.

**MediValue Prime and MediPlus Prime:** Voluntary - can nominate a FP which MUST be from the FP network to a MAXIMUM of two (2) FP's per beneficiary. *Where a FP was nominated from the FP Network & Day-to-Day benefit is depleted the member will qualify for an additional 2 visits per FAMILY from OAL.*

The registered networks per option are available on the website, please visit: [www.medshield.co.za](http://www.medshield.co.za)

Beneficiary	Beneficiary Name	Nominated Family Practitioner Name	Practice Number / Telephone
Principal Member		1	1
		2 PRIME OPTION ONLY	2 PRIME OPTION ONLY
Dependant 1		1	1
		2 PRIME OPTION ONLY	2 PRIME OPTION ONLY
Dependant 2		1	1
		2 PRIME OPTION ONLY	2 PRIME OPTION ONLY
Dependant 3		1	1
		2 PRIME OPTION ONLY	2 PRIME OPTION ONLY
Dependant 4		1	1
		2 PRIME OPTION ONLY	2 PRIME OPTION ONLY
Dependant 5		1	1
		2 PRIME OPTION ONLY	2 PRIME OPTION ONLY
Dependant 6		1	1
		2 PRIME OPTION ONLY	2 PRIME OPTION ONLY
Dependant 7		1	1
		2 PRIME OPTION ONLY	2 PRIME OPTION ONLY

## SECTION D

### PREVIOUS MEDICAL AID HISTORY

Where applicable, please provide details and proof of all previous registered South African medical schemes you and your dependants belonged to (proof in the form of membership certificates reflecting the join and end dates, must be attached to this application form). This information is used to determine whether waiting periods and or late joiner penalties are applicable.

Where late joiner penalties have already been imposed and evidence of credible cover is produced thereafter, the penalty shall be recalculated and such revised penalty shall be applied from the following month. No backdate will be allowed unless evidence of previous submission is provided to the Scheme.

Select relevant box with a tick:

Principal Member:

☐

Dependant:

☐

Name & Surname:

Name of Scheme:

Membership Number:

Date Joined:

Date Terminated:

Principal Member:	<input type="text"/>	Dependant:	<input type="text"/>
Name & Surname:	<input type="text"/>		
Name of Scheme:	<input type="text"/>		
Membership Number:	<input type="text"/>		
Date Joined:	<input type="text"/>	Date Terminated:	<input type="text"/>

Principal Member:	<input type="text"/>	Dependant:	<input type="text"/>
Name & Surname:	<input type="text"/>		
Name of Scheme:	<input type="text"/>		
Membership Number:	<input type="text"/>		
Date Joined:	<input type="text"/>	Date Terminated:	<input type="text"/>

### IMMUNE DEFICIENCY STATUS (Confidential Disclosure)

If you, or any of your dependants, have been diagnosed with HIV/AIDS or any immunoglobulin deficiencies, please contact Medshield HIV/AIDS Management Programme on 086 050 6080 to register on the HIV/AIDS Disease Management Programme. Failure to do so within 21 days of joining the Scheme will be considered as non-disclosure of information and may result in termination of your membership.

### SECTION E

### REFUND BANK DETAILS

I hereby authorise Medshield Medical Scheme to pay claim refunds to the following bank account.

A stamped bank statement or a stamped confirmation letter from the bank in the name of the Principal Member not older than 3 months is required.

Use this account for: **Claims Refunds Only** ☐

Bank Name:	<input type="text"/>		
Branch Name:	<input type="text"/>		
Branch Code:	<input type="text"/>		
Type of Account: (Mark with an X)	Current	Transmission	Savings
Name of Account Holder:	<input type="text"/>		
Bank Account Number:	<input type="text"/>		
Date:	<input type="text"/>	<input type="text"/>	

I \_\_\_\_\_ (account holder's full name) the undersigned, declare that: I understand that Medshield will rely upon the facts set out herein for the accurate loading of bank details. I understand and accept that should any details contained herein prove to be incorrect, or should I fail to inform Medshield of any subsequent change to the bank details, Medshield will not be held responsible. I also agree that I am the account holder of the bank details provided and I hereby authorise Medshield to electronically pay refunds to the above bank via the Elektropay system using the information provided. I also irrevocably authorise Medshield to reverse any erroneous transaction and/or rectify any electronic transfer of funds error without prior notice.

I hereby authorise Medshield Medical Scheme, or any of its nominated representatives, to verify the bank details as stipulated on this form. Give consent that Medshield Medical Scheme, may collect, process, store and share our personal information with the Scheme's respective Service Providers including South African Revenue Services. This information includes, but is not limited to details such as, name, surname or registered name (in the cases of companies and trusts), identity numbers, registration number, tax number, addresses and other details which could include financial information and banking.

Signature of Account Holder: \_\_\_\_\_

**SECTION F****EMPLOYER APPROVAL (Companies/Group members only)**

Name of Employer:

Paypoint Code:

Employee Payroll No.:

Employment Date:

COMPANY STAMP

*If no Company Stamp is available,  
please mark this block with an X.*

We confirm that the applicant is employed by us and commenced employment  
on the above date and all fields of Section F have been completed:

Employer's Email Address:

Employer's Representative's Name:

Employer's Representative's Designation:

Date:

Employer's Representative's Signature: \_\_\_\_\_

**SECTION G****CONSENT (Consent for Medshield Medical Scheme to process personal information)**

The Scheme understands that your personal information and that of your dependants is important to you. Medshield undertakes to keep this information confidential and shall take all reasonable steps to comply with the provisions of legislation protecting your personal information.

We require your consent to obtain, process and disseminate your personal information so we can provide you with the services stipulated in our contractual agreement, as detailed for your chosen benefit option and in compliance with the Medical Schemes Act 131/1998. These services include but is not limited to:

- a. Treatment Authorisations;
- b. Claims Assessment;
- c. Claims Payment;
- d. Communication;
- e. Disease Management; and
- f. Wellness Initiatives.

While your consent is voluntary, it is a requirement for the administration of your Medshield membership. If you object to the processing of your personal information, the Scheme will not be able to activate and service your membership.

**Please carefully read and consent to the items listed below:**

I hereby consent, with the permission of my dependants, that the Scheme may collect, use, process, retain and share my and my dependant's personal information for the purpose of providing medical scheme benefits, managed healthcare services and medical scheme specific value adds. This includes the collecting and sharing of my personal information with the Scheme's partners and facilities who are essential to the administration and ongoing membership process.

You can access more details on the Protection of your Personal and Health Information on the Medshield website [www.medshield.co.za](http://www.medshield.co.za). When you accept these terms and conditions you will allow us to provide your family with the full range of our Medshield services.

I hereby acknowledge and declare that as the Principal Member of the Scheme, I have received the necessary consent from my dependant(s) and act on their behalf in any matter relating to this application and the administration of our Medshield Membership and to access and view their healthcare claims.

Confirm that if I (Principal Member) am part of a group membership by virtue of employment, I grant permission to Medshield Medical Scheme to share information relating to my membership with my employer and my employer's appointed broker. This will be limited to information that is relevant to my application, collection of contributions and information that is required for the ongoing servicing of my membership, but will not include any health information unless I have given Medshield permission to do so.

Give permission that the Scheme may share my personal information including that of my dependants with my chosen Financial Advisor/ Broker, if any, who is an accredited Medical Aid Broker of my choice.

Principal Member Signature: \_\_\_\_\_

Date:



Please carefully read and agree to the declarations below.

1. I the undersigned, hereby apply to be admitted as a member of Medshield Medical Scheme (hereafter referred to as "the Scheme") and agree that my dependants and I shall abide by its Rules as amended from time to time which are available on Medshield's website [www.medshield.co.za](http://www.medshield.co.za)
2. I understand that the Scheme's brochures are a summarised version and do not supersede the rules of the Scheme.
3. I acknowledge that I have familiarised myself with the benefits covered on my benefit option of choice and that I may only change my benefit option during year-end for an effective date of 01 January.
4. I am aware of the fact that on joining the Scheme during the course of a calendar year, the maximum benefits to which I may be entitled shall be adjusted in proportion to the period of membership calculated from the date of admission to the end of the particular calendar year
5. I certify that all the information given is true and correct, whether completed by me or on my behalf, and acknowledge that non-disclosure of any information by me, or my dependants, relevant to the assessment of this application, shall render any contracts to which this application relates null and void, effective from date of registration. In such event, the Scheme will have the right to offset applicable costs against contributions paid and refund the difference, if any.
6. I understand that should a period greater than three (3-month) lapse since contributions were paid to Medshield, that my membership will not be reinstated and that I have to re-apply subject to full underwriting.
7. I undertake to give notice to the Scheme to terminate my membership in accordance with the Rules of the Scheme.
8. Furthermore, I understand and agree that I will be liable for any legal cost incurred in the recovery of any amount owing to the Scheme and should there be any outstanding money owed to the Scheme, the Scheme has the right to terminate my membership, and list my details with a credit bureau.
9. I hereby authorise my employer to deduct, from my salary, any amount I may lawfully owe to the Scheme and to pay over such amounts to the Scheme.
10. Notwithstanding point 9, I understand that it is my responsibility as a member to ensure that the monthly contributions are received by the Scheme.
11. I hereby authorise the Scheme, or any of its nominated representatives, to verify my bank details.
12. I acknowledge and agree that it's my responsibility to advise the Scheme in writing of any change in banking details. The Scheme will not be liable should an incorrect account be credited under any circumstances
13. The Scheme may give any notice in terms of its Rules to me at my domicilium citandi et executandi or by any agreed electronic means unless otherwise notified. Any notice given to me by prepaid registered post at my domicilium citandi et executandi or by any agreed electronic means shall be deemed to have been received by me on the 7th day after the date of posting.
14. I understand that the following waiting periods may be applicable as prescribed by the Medical Schemes Act No. 131 of 1998:
  - a 3 (three) month general waiting period in respect of all benefits;
  - a maximum 12 (twelve) month exclusion in respect of a pre-existing condition;
  - a late joiner contribution penalty.
15. I agree to inform the Scheme of any deterioration or change in my state of health or in that of my dependant(s) before the commencement date of membership, or the date of acceptance of this application form by the Scheme, or the date of receipt of the first subscription, whichever date is the latest shall entitle Medshield to reconsider the application and propose new terms of admission.
16. It is illegal to be a member of more than one medical scheme at the same time. I acknowledge that it is my responsibility to resign from my existing medical scheme and agree that neither me, nor any of my dependants, will be registered on both Medshield and another medical scheme simultaneously.
17. I hereby acknowledge that I have read and understood the content of this application form. I declare that all information provided on this form, to the best of my knowledge is true and accurate.

Signed at: \_\_\_\_\_

Date:

Principal Member Signature: \_\_\_\_\_

*NB: Medshield Medical Scheme requires that your application form be submitted to the Scheme within 30 calendar days of the Member Declaration sign date, in order to avoid your application being rejected due to it being stale.*



# Benefits of appointing Aon South Africa Healthcare as your intermediary

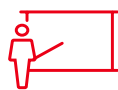
Across Aon, we are united in our passion to provide you with the insights and support to make Better Decisions around all aspects of your holistic wellbeing, medical scheme, gap cover and primary care insurance. We have a team of professional, fully accredited advisors to assist you with all your medical schemes, Gap cover and Primary care enquiries.

## Our philosophy is to:



### Guide:

our members in selecting the medical scheme, Gap cover insurance or Primary care options aligned to their needs.



### Educate:

our members with ongoing training throughout the year, end of year medical schemes and Gap cover benefits and rate changes.



### Protect:

the rights of members by applying the Medical Scheme Act and scheme rules when resolving disputes with the medical schemes on behalf of the members.

## Catalogue of services and technological platform accessible to our members

- **Microsites:** Provides you with access to voice recorded Induction, Year-end launch highlight presentations, brochures, COVID-19 updates, various application forms.
- **Aon Resolution Centre:** Professional assistance with your Medical scheme, Gap cover or Primary care claim resolution, comparison or benefit explanation.
- **Year-end renewal communications:** Access to the following:
  - **Alert** - Provides high level summary of benefits and rates changes launched by medical scheme, Gap cover insurance as well as Primary care providers.
  - **Member letter** - Provides comprehensive information in relation to the benefits and rates changes implemented by Medical scheme, Gap cover or Primary care provider.
  - **Guidance letter** - Aon generates guidance letters for members that are under or over insured. The purpose of the guidance letter is to guide a member on selecting an appropriate option aligned to his/her needs.
- **Client Assistance Programme**
  - We are delighted to offer you access to a range of essential services at absolutely no charge. The Aon Client Wellbeing Programme is a telephonic, online, and structured e-mail support program (excluding in-person or video sessions). The following services are available through our third- party service provider, LifeAssist:
    - Structured Telephonic Counselling
    - Telephonic Trauma Support
    - Financial Wellbeing Coaching
    - Legal Advisory Services
    - Health and Wellness Services (professional advice from a dietician and a biokineticist)
- **General Updates:**
  - Ad-hoc updates pertaining to Medical schemes industry and providers specific updates.

## Cost of appointing Aon

We are pleased to inform you that there is no additional fee charged by Aon when you appoint Aon Healthcare as your Healthcare intermediary. Aon earns monthly commission which is already included in the monthly contribution you pay over to the medical scheme. Monthly commission is part of your total monthly contributions paid to the scheme whether you have appointed Aon as broker or not. This monthly commission is 3% of the contribution to a maximum amount payable (as disclosed on the Brokers Statutory Notice) to brokers in terms of Section 65 of the Medical Schemes Act, 131 of 1998, plus value added tax (VAT). In terms of Primary Care Insurance products, we earn maximum 3%. Gap Cover Insurance products, we earn commission on a sliding scale from 5% up to 20% depending on policy holder's monthly contributions.

## For more information, contact Aon South Africa:

0860 100 404 | [arc@aon.co.za](mailto:arc@aon.co.za) | [www.aon.co.za](http://www.aon.co.za)

## Connect with us

We focus on communication and engagement, across insurance retirement and health, to advise and deliver solutions that create great client impact. We partner with our client and seek solutions for their most important people and HR challenges. We have an established presence on social media to engage with our audiences on all matters related to risk and people.

For more information from Aon Employee Benefits on healthcare, retirement benefits and a wide range of topics feel free to go to [www.aon.co.za](http://www.aon.co.za)

<http://www.facebook.com/Aonhealthcare>  
Click "Like" on our page (Aon healthcare)

[http://twitter.com/Aon\\_SouthAfrica](http://twitter.com/Aon_SouthAfrica)  
Click "follow" on our profile

## Aon Employee Benefits – Healthcare

Aon South Africa Pty Ltd, an Authorised Financial Service Provider, FSP # 20555.

<http://www.aon.co.za/disclaimer>

On all services provided, Aon's Terms & Conditions of Business, as amended from time to time, are applicable and can be found at <http://www.aon.co.za/terms-of-trade> or will be sent to you upon request.

[Privacy Notice](#)

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## Disclaimer:

The Benefits and contributions are subject to approval by the council for medical schemes. Although care is taken to represent the rates and benefits correctly, errors and omissions could occur. In case of any conflict, the rules of the affected medical scheme prevail. Any decisions regarding your medical scheme portfolio should be made in conjunction with your Aon Employee Benefits consultant or manager. While Aon has taken reasonable steps to ensure that the information contained in this report is relevant, accurate and current, no warranties of any kind, whether express or implied, including but not limited to the accuracy, completeness, relevance or fitness for a particular purpose are given and Aon expressly disclaims any liability for any loss or damage that may arise from the use of this report. This report is confidential and intended solely for the use of the individual or entity to whom it is addressed. If you received this report in error, you should not disseminate, distribute or copy this report and you should notify Aon if you are not the intended recipient and destroy the report. The report is copyright of Aon SA (Pty) Ltd. You may not, except with our express written permission, distribute or commercially exploit the report. Aon hereby authorizes you to copy the report for non-commercial use within your organization only.

## POPIA

Protection of Personal Information Act 4 of 2013 (POPIA), Medical Schemes are requesting a signed Broker Appointment letter to make certain information available to Aon South Africa (Pty) Ltd.



Contact us on: 0860 100 404, P.O. Box 78367, Sandton, 2146, [www.aon.co.za](http://www.aon.co.za)  
FSP number: 20555; CMS number: ORG895  
Follow our [website link](#) for further information on Aon's processing of your personal information

## Acknowledgement of appointment

I acknowledge and appoint Aon South Africa (Pty) Ltd as my financial advisor for all matters related to my medical scheme membership.

My ID: \_\_\_\_\_ and membership number: \_\_\_\_\_

Signed at (Town or City): \_\_\_\_\_ on yy/mm/dd: \_\_\_\_\_

I have been informed that there is no additional fee charged by Aon for providing you with healthcare intermediary services. Aon earns monthly commission which is already included in the monthly contribution you pay over to the medical scheme. Monthly commission is part of your total monthly contributions paid to the scheme. This monthly commission is 3% of the monthly contribution to a maximum amount payable (as disclosed on the Brokers Statutory Notice) to brokers in terms of Section 65 of the Medical Schemes Act, 131 of 1998, plus Value Added Tax (VAT).

**Permission to process my personal information as well as personal information of all dependents included on my membership application form and I consent to Aon South Africa (Pty) Ltd accessing information listed on the table below.**

I give consent for the disclosure of information about me.

Membership number: \_\_\_\_\_ ID or passport number: \_\_\_\_\_

Title: \_\_\_\_\_ Initials: \_\_\_\_\_ Surname: \_\_\_\_\_

First name(s) (as per identity document): \_\_\_\_\_

The following information should be made available to my appointed financial advisor as is necessary:

Personal examples	Benefit examples	Financial examples	Medical examples
<ul style="list-style-type: none"><li>* Name and Surname</li><li>* Membership number</li><li>* Date of birth</li><li>* ID number</li><li>* Postal Address</li><li>* Physical address</li><li>* E-mail Address</li><li>* Telephone numbers</li><li>* Cellular Number</li><li>* Number of dependents</li></ul>	<ul style="list-style-type: none"><li>* Plan type</li><li>* Medical Savings Account (MSA)</li><li>* Balance Medical Scheme benefits</li><li>* Spent for the year Accumulated</li><li>* Medical scheme Savings Account</li><li>* Medical Savings Carry over from previous year</li><li>* MSA reimbursement, Scheme Rate or cost</li><li>* Self-payment Gap</li><li>* Above Threshold Benefit</li><li>* Waiting period details</li><li>* Late joiner penalty indicator</li><li>* Wellness benefits</li></ul>	<ul style="list-style-type: none"><li>* Total Contribution</li><li>* Contribution breakdown</li></ul>	<ul style="list-style-type: none"><li>* Chronic Indicator/confirmation (Yes/No)</li><li>* In Hospital Indicator/confirmation (Yes/No)</li><li>* Confirmation of claims paid and from what benefit</li><li>* Claims transaction history</li><li>* Procedures done in doctor's rooms paid from Hospital Benefit</li></ul>



By signing this letter of appointment , I confirm that I have fully read and understood the contents of this document and provide my express consent for Aon South Africa (Pty) Ltd ("Aon") to process my Personal Information including but not limited to special personal information, as well as that of my beneficiaries and where necessary including my minor children (as defined in the Protection of Personal Information Act no 4 of 2013) for the purposes set out herein and which Personal Information may be shared and or disclosed with any party including but not limited to service providers who Aon (in it's reasonable discretion) has an obligation or requirement to share or disclose my Personal Information and that of my beneficiaries and where necessary my minor children in compliance with its obligations in law or contract.

Signed at (Town or City): \_\_\_\_\_ on yy/mm/dd: \_\_\_\_\_

Signature: \_\_\_\_\_