



**Risk Management - Tax Consultants - Private Wealth - Group Benefits**  
Office: 012 346 3001 | Website: [www.helfin.co.za](http://www.helfin.co.za) | Address: 106 Nicolson Street, Brooklyn, Pretoria, 0181

## How to lodge a complaint:

The client is to submit the complaint to the FSP in writing to the contact details that appear in the Complaints Management Framework.

The complaint can be submitted by:

- Hand
- Email - [Michael@helfin.co.za](mailto:Michael@helfin.co.za)

(If a complaint is submitted telephonically, the FSP will send the client an email to request the relevant details regarding the complaint. The client needs to respond and provide the requested information in writing (e.g. hand, post, fax or email).

The client must submit sufficient detail of the complaint, this includes their:

- Name and surname Policy number
- ID number
- Postal address
- Financial Advisor
- Product Supplier
- Product Type: Risk, Investment, Short term, Endowment, Employee Benefits, Disability, Medical Aid, Unit Trust, Wills etc. o Complaint Category: Product features and charges; Information Disclosures; Advice; Product performance; Client Services; Access; Changes or Switches; Complaints Handling; Claims; or Other complaints.
- Brief detail of the complaint

The complaints management framework is available upon request.