



WEBSITE USER GUIDE

2023



NATIONAL TERTIARY RETIREMENT FUND



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WELCOME TO YOUR NEW NTRF WEBSITE

Welcome to your NEW FUND WEBSITE! On <https://ntrf.co.za/> you have a world of possibilities at your fingertips. Let's dive in!

Curious about your financial future? Navigate to the 'Calculators' tab and let our intuitive tools provide the insights you're looking for!

Need expert advice? 'Ask Someone' is your direct line to a Benefit Counsellor or a Financial Advisor.

Looking for something specific? The 'Search' button is your gateway to all the info you need.

Navigate like a pro! With just a click, you can explore different menu tabs and effortlessly find all the Fund information you need. Your investment insights are just a tab away!



Home Benefits Investments Forms Calculators Communication and News Contact Us

Search Register Login

Want the latest scoop? Our rolling banners showcase all the newest campaigns you won't want to miss.

The Latest Fund News!

Get ready to be inspired! Discover more about your Fund investments, find links to the latest member webinars, meet your new board member and more...

Read



Ask Someone

I want to:

- I want to see my Fund Value
- I want to get a Benefit Statement
- I want to check/update my Expression of Wish form
- I want to withdraw money from my Fund
- I want to see my Benefits

View your Fund Value

VIEW



Navigate your financial journey with ease using our Quick Links! From viewing your member share to exploring withdrawal options, everything you need is just a click away.

Use Quick Links to easily find forms and read our member guide. Reach out to us through the 'Contact Us' page.

We value your feedback! Make your voice heard by participating in our polls.

Quick Links

Voting Poll

I have multiple streams of income

- Yes
- No

SUBMIT



<h4>Investments</h4> <p>Learn more about where your money is invested and how much it has grown</p> <p>Click Here</p>	<h4>Retiring Soon</h4> <p>Learn more about your options to retirement, the process, how long it will take, who to ask</p> <p>Click Here</p>
<h4>Divorce Orders</h4> <p>Learn more about your divorce and your retirement savings</p> <p>Click Here</p>	<h4>Resigning Soon?</h4> <p>Learn more about your options when you resign from your employer, the process, how long it will take, who to ask</p> <p>Click Here</p>

View your Member Share [VIEW](#)

As you scroll, you'll always see a handy button fixed at the bottom of the page, making it easy for you to take the next step whenever you're ready.

From investment choices to life changes, our Additional Links section has all the essential info you need in just a few clicks.

Got any questions? Open our **LiveChat** box for instant guidance. We'll direct you to the right spot or escalate your query if needed.

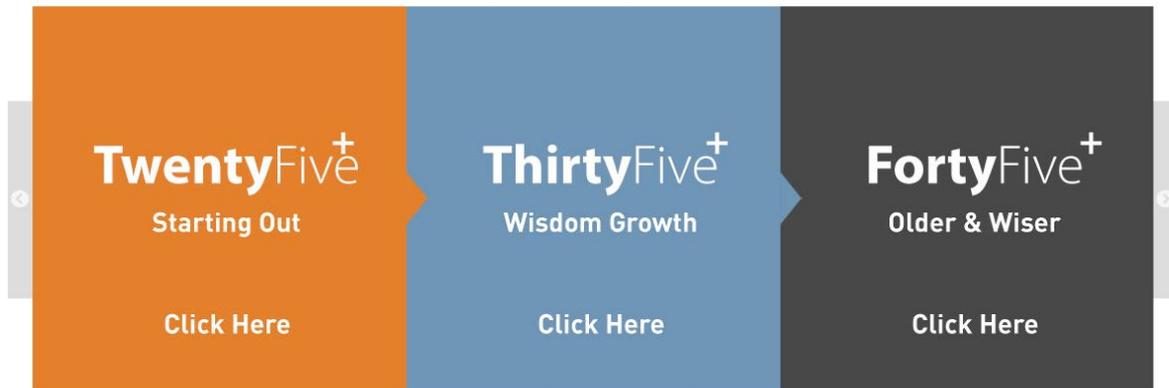
Stay in the know with our 'Latest News' section, where we bring you all the buzzworthy topics!

Latest News

<p>National Wills Week 11 - 15 September 2023</p> <p>National Wills Week 2023</p> <p>From 11 - 15 September, participating attorneys will draft basic wills FREE OF CHARGE.</p> <p>Learn More</p>	<p>Get Rich Slowly, Not Poor Quickly!</p> <p>Steer clear of suspicious schemes and scams</p> <p>There are many criminals out there who want to get their hands on your money. Here's how to spot a scam before it's too late.</p> <p>Learn More</p>	<p>Useful Calculators</p> <p>What is your attitude towards money?</p> <p>Useful Calculators</p> <p>Have fun with our useful financial calculators.</p> <p>Learn More</p>
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Get ready for an epic retirement journey! Our 'Your Journey' links are your VIP pass to invaluable tips and tricks at each exhilarating stage.

Your Journey



Stay connected and informed! You'll find a 'Contact Us' section at the foot of every page for your convenience. Plus, keep an eye out for our special picture link—a nudge for you to regularly review or take action on crucial Fund information.

Contact Us

NAME

SURNAME

EMAIL

YOUR ENQUIRY

SEND

ADMINISTRATORS
Contact the Administrator for all claim queries and other Fund-related queries

0860 000 071
NTRF@momentum.co.za

Momentum Retirement Administrators
The Marc
129 Rivonia Rd
Sandown
Sandton

OFFICE OF THE PRINCIPAL OFFICER
Contact the Principal Officer for all escalations of queries

011 258 8825
info@gobenefits.co.za

Building 2
Country Club Estate
Woodlands Drive
Woodmead

WEBSITE TECHNICAL SUPPORT:
support@insiteeducation.co.za

Click Here

Show them
YOU CARE!

Update your Expression of
Wish Form

GET YOUR VALUES

Ready to take charge of your finances? Hop on over to the Secure NTRF Portal to get up-close and personal with your Fund info. Here's a sneak peek of what you can explore:



** These are not 'live' documents but the last verified versions.*

Before you login, you need to follow these easy steps to register:

Step 1 Register on the portal.

Registration is a quick and easy process. Please complete the information below:

Step 2 Once you have registered, you will receive a **One-Time-Pin (OTP)**. It will be e-mailed to you. Once you have logged in, you will see a world of information at your fingertips.

NEED HELP? If you do not receive the **One-Time-Pin (OTP)**, or need any assistance with your registration or login, chat to us in real-time.

Need to speak to someone about a change you are considering or your readiness to retire?

If you need assistance with understanding your benefits in the NTRF or require advice on financial planning, click on '**Ask Someone**'. You will have two options:

- Schedule a **FREE** virtual counselling session with a **Benefit Counsellor**. It's quick and easy. Read the next section for more information about the Benefit Counsellors.
- Chat with a **financial adviser**. Please note that this is not a free service.

E Nkhatu
Member Number: 13400008332
Date of Birth: 05 Dec 1973
Participating Employer: Universities South Africa
Employee Number: NKH001
Retirement Age: 60

[Ask Someone](#) [Log Out](#)

Your Fund Value for the month of: **July 2023**

My Profile

Category	Value
NTRF Long Term Capital	R2 485 710.95
Total	R2 485 710.95

Unit Prices
NTRF Long Term Capital: R437.89
[Switch Investments](#)

Contributions

Contributions to the Fund are made by both members and their respective employers in the following percentages:

- Members - **8%** of pensionable salary
- Employers - **16%** of pensionable salary

Risk Benefits

[Click here for more information on your Risk Benefits.](#)
[Please login to the Momentum Portal to see your Risk Benefits](#)

Are you considering leaving your employer?

[Resign](#) [Retire](#)

I want to:

- [View my Expression of Wish](#)
- [Capture/View my Divorce Order](#)
- [View my Personal Details](#)

This section provides everything you need to know when considering leaving your employer. You can also find a link to the necessary forms here.

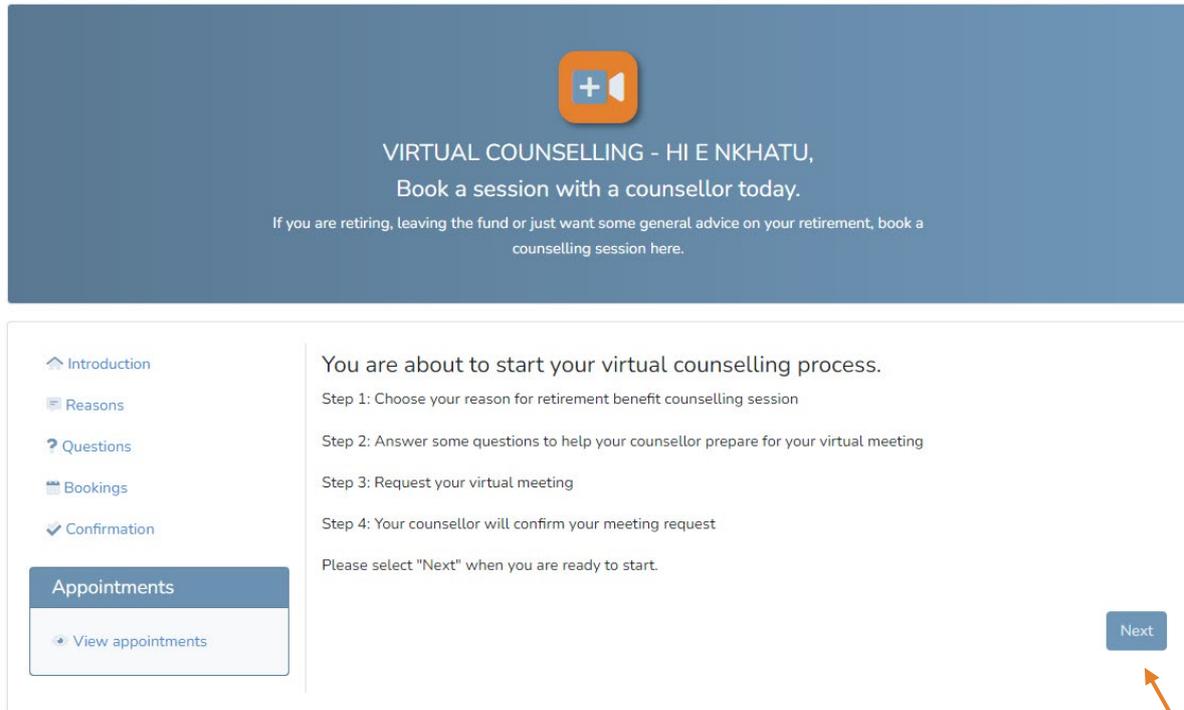
View the latest transactions on your account here.

Download your benefit statement here.

BENEFIT COUNSELLOR PORTAL

You can now book a FREE virtual session with a Benefit Counsellor if you have any questions about your options in the Fund or your benefits. Once you have logged into the Secure Portal, please click on 'Ask Someone' and select 'Ask a Benefit Counsellor [free]'.

You will be taken to the page below where you can book a virtual session:



The screenshot shows a blue header with a video icon and the text: "VIRTUAL COUNSELLING - HI E NKHATU, Book a session with a counsellor today. If you are retiring, leaving the fund or just want some general advice on your retirement, book a counselling session here." Below this is a white sidebar with navigation links: Introduction, Reasons, Questions, Bookings, Confirmation, and Appointments (highlighted). Under Appointments is a link "View appointments". The main content area says: "You are about to start your virtual counselling process." followed by four steps: Step 1: Choose your reason for retirement benefit counselling session; Step 2: Answer some questions to help your counsellor prepare for your virtual meeting; Step 3: Request your virtual meeting; Step 4: Your counsellor will confirm your meeting request. It concludes with "Please select 'Next' when you are ready to start." and a blue "Next" button. An orange arrow points from a text box to the "Next" button.

Click on '**Next**' to follow the easy process to book your virtual counselling session.

You can also contact them on:

- **Email:** info@benefitcounsellor.com
- **Tel:** 021 300 57290

LEAVING YOUR EMPLOYER SOON?

Click on 'Resign' or 'Retire' on the screen below:

E Nkhatu

Member Number: 1340008332

Date of Birth: 05 Dec 1973

Participating Employer: Universities South Africa

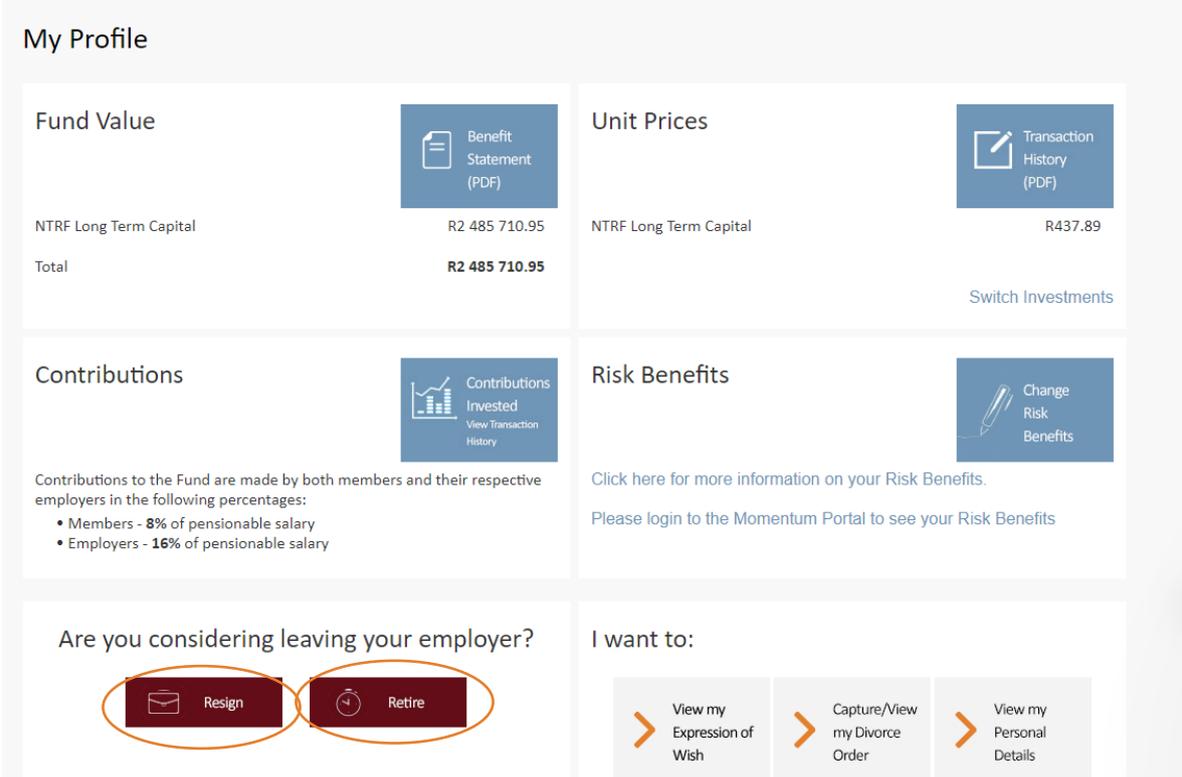
Employee Number: NKH001

Retirement Age: 60

 Ask Someone

Log Out

Your Fund Value for the month of: **July 2023**



My Profile

Fund Value NTRF Long Term Capital Total R2 485 710.95 R2 485 710.95	Benefit Statement (PDF)	Unit Prices NTRF Long Term Capital R437.89 Switch Investments	Transaction History (PDF)
Contributions Contributions to the Fund are made by both members and their respective employers in the following percentages: <ul style="list-style-type: none">Members - 8% of pensionable salaryEmployers - 16% of pensionable salary	Contributions Invested View Transaction History	Risk Benefits Click here for more information on your Risk Benefits. Please login to the Momentum Portal to see your Risk Benefits	Change Risk Benefits
Are you considering leaving your employer? Resign Retire	I want to: View my Expression of Wish Capture/View my Divorce Order View my Personal Details		

You will be directed to a page where you will find information on:

- How to submit your claim form,
- A link to the latest withdrawal info, and
- A link to the latest withdrawal forms.

You will also learn about the process to expect when you resign or retire.

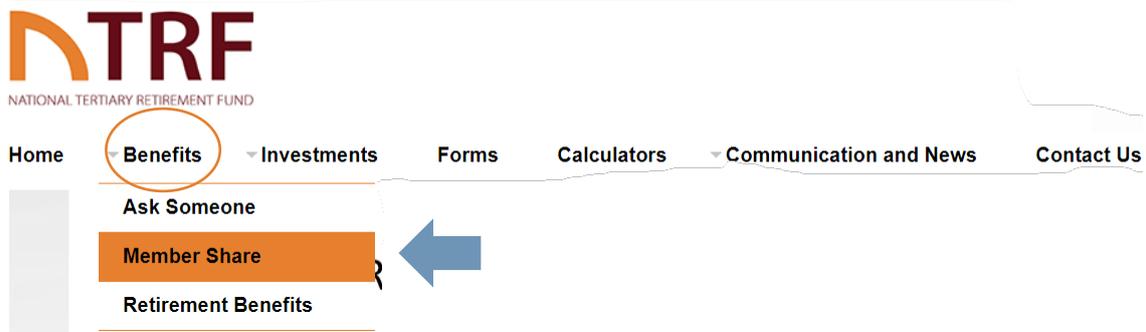
Additionally, there's a link that will take you to the Benefit Counsellor portal. The Benefit Counsellor Portal will guide you through the withdrawal and retirement process step by step.



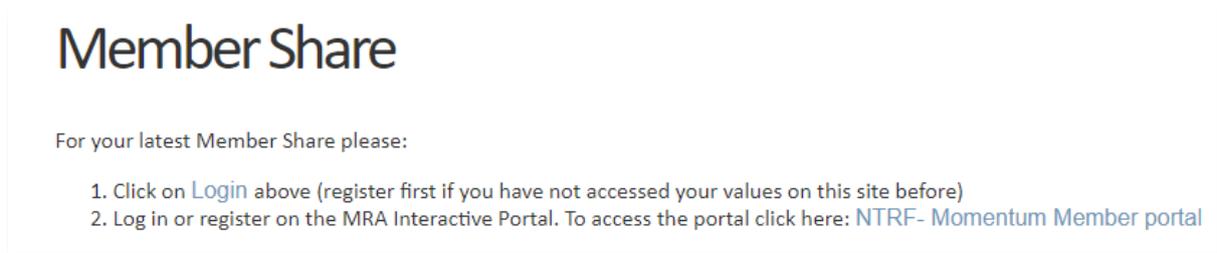
Click on this link to work through an informative process and become an empowered member today.

MOMENTUM MEMBER PORTAL

You still have the option to view your personal Fund information on the Momentum Member Portal. Just head to the top menu on the website, click on the “**Benefits**” tab and select “**Member Share**”.



Feel free to log in to either the Momentum Member Portal or the Secure Portal to view your own values.



NEED ASSISTANCE?

Need information from the website, or assistance with registration or login?

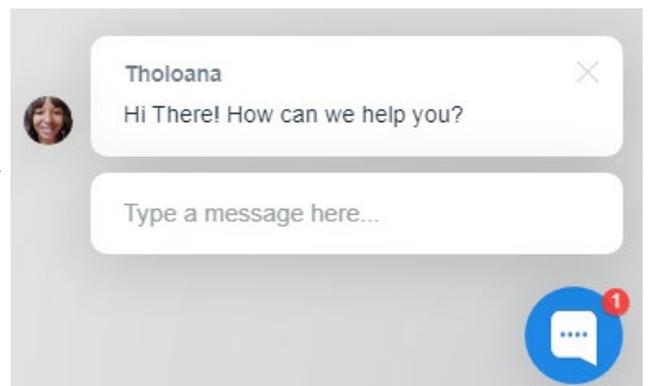
Chat with us in real time on the website.

Have questions about a claim or other Fund-related matters?

Contact the Administrator:

Phone: 0860 000 071

Email: NTRF@momentum.co.za



Require clarity on your benefits within the NTRF?

For questions about your options in the Fund or your benefits, reach out to The Benefits Counsellors. This service is FREE.

Email: info@benefitcounsellor.com

Phone: 021 300 57290

[Click here](#) to log into your account. From there, you can schedule an appointment with a benefit counsellor.

Seeking advice on financial planning?

Visit the Financial Planning Institute (FPI) website at <http://www.fpi.co.za/> to find a qualified financial advisor who can provide expert guidance.

Need to escalate an issue?

Contact the Office of the Principal Officer:

Phone: 011 258 8825

Email: info@gobenefits.co.za