

### Current Medical Aid

Scheme  
Provider  
Member Since  
  
Premium

Option

Continues Membership in years

At Application stage, all membership certificates would be needed

### Main member information

Full Names

Surname

ID number

Date of Birth

Passport number

Monthly Income

This is required for income level plans

#### *Contact Details*

Work Contact Number

Home Contact Number

E-mail

Cell phone

Postal Address

Physical Address

### Dependants

#### ***Spouse***

Full Names

Surname

ID Number

Current medical needs or condition

#### ***Adult Dependants***

Full Names, Surname and Date of Birth

Current medical needs or condition

#### ***Child Dependants***

Full Names, Surname and Date of Birth

Current medical needs or condition

***What is important to be covered?***

Do you need Chronic medication? if YES - What medication is needed

(Chronic - Prescribed medication that you need for continues period.)

Yes

No

What is your current spend per month on Chronic Medication?

Do you visit your GP often? If YES - How often?

Yes

No

Do you prefer you current GP? If YES - Do you know with whom is he/she contracted with?

Yes

No

Do you need specific or specialised Dental Care? If YES - Elaborate please.

Yes

No

Do you need Day-to-Day expenses? (Doctors Visits, Dentists, Acute Medication)

Yes

No

Do you need specific or specialised Eye Care? If YES - Elaborate please.

Do you travel abroad often?

Where do you travel to?

Which hospitals are near your frequent areas?

Do you have Emergency Savings available?

Any other special requirements that you want to mention?

## Preferred Medical Scheme and Options to consider?

What monthly premium are you looking at?

I have completed and provided RI Financial Management Services (PTY) Ltd with the required

Authorisation Letter

or

RI Financial Management Services (PTY) Ltd is my Appointed FSP.

RI Financial Management Services (PTY) Ltd has a referral agreement with MedQuote which in turn use Optivest Health Solutions (FSP: 13475) as their fulfillment partner.

MedQuote - They prepare all the quotes and advice relating to the quotes.

MedXpert - Client services with a dedicated Private Client Manager to assist you with your active Medical Aid.

I could anticipate to be contacted by them to confirm my information and to provide me with advice relating to the Scheme or Plan options.

Please take note of the following:

[CMS Frequently Asked Questions](#)

**Late Joiner penalty** - When you are 35 and older the scheme can impose the late joiner penalty. You have to show proof of continues membership to a scheme by way of your membership certificates.

Penalty bands

After age 35, years of no cover

1 - 4 years

5 - 14 years

15- 24 years

25+ years

Maximum penalty

0.05 x monthly contribution

0.25 x monthly contribution

0.50 x monthly contribution

0.75 x monthly contribution

**Waiting periods** - The scheme can impose a general 3 month waiting period which could include or exclude PMB and or 12 month condition-specific waiting period.

While in the waiting period the scheme will not pay for any benefits.

I herewith give consent to RI Financial Management Services (PTY) Ltd to provide my information to Optivest Health Services to be able to provide me with related service.

Signed on (Date)

(Place)

(Year)

Signature of Main member

