

# 1. Submit a CCP Request Using Digital Consent

- Navigate to the **Home screen** (or **CCP tab > Create Request**)
- On the **Client Search Details** screen, **tick** the Digital Consent **Tick-box**
- **Type in** the Client’s Cellphone number and email address **in addition** to the search details
- **Click** on the **Continue** button to proceed to the Declaration Form

## CCP Quick Transact

My Clients

Obtain Digital Consent From Client?

Id/Passport Number: 7410017000082

Id Type: South African \*

Date of Birth: 1974/10/01 \*

Initials: OH \*

Surname: Dear \*

Cell Number: 0820004567

Email Address: training@astutefse.com

Continue *Click here to proceed*

- On the **Declaration Screen**, **read before confirming** that the cellphone number and email address captured for digital consent are those of the client, and not your own
- **Click on *Accept and Submit all Enquiry(s)***.

## Consolidated Client Portfolio Declaration

**Declaration:**  
I declare that:  
I am an authorised user as defined in the Intermediary Agreement concluded with the Financial Services Exchange (Pty) Ltd, trading as Astute, and consider myself bound by the terms and conditions of the Intermediary agreement with Astute relating to the use of the Astute Systems.

**I warrant and guarantee that the information provided by me for the purposes of the Digital Consent is that of the client (data subject) whose information is being requested and have dually confirmed such information and contact details belonging to the said client (data subject).** NEW

For the purposes of the Long-Term Insurance Act, client means the investor or policy owner. I am aware that the information accessed is private and confidential and may only be used for authorised purposes and that any breach of confidentiality could result in disciplinary steps or legal action being taken against me and that access to Astute services may be suspended or terminated at any time.

I indemnify Astute, or any provider of content via Astute, against any action, which may be taken against Astute or any such content provider, by any natural or legal person, as well as against any damage or loss, including interest or legal costs incurred by Astute or any Content Provider as a result of such action, damage or loss which Astute or the Content Provider may suffer or incur as a result of the unauthorised use of the information accessed.

Id/Passport Number	Client Name	Date of Birth	Content Providers	Transacting As
7410017000082	OH Dear	01 Oct 1974	ABSA Life, Discovery Life, FMI, Hollard Life, Liberty Group Limited, Liberty Group Limited (CAL), Metropolitan, Momentum, Nedbank Insurance, Old Mutual South Africa, PPS, Sanlam, Allan Gray (Manco & LISP), Discovery Invest, Momentum Wealth, Old Mutual Wealth, STANLIB, Old Mutual Unit Trusts, Sanlam Collective Investments	Astute Staff

10 items per page 1 - 1 of 1 items

Decline Enquiry(s) **Accept and Submit All Enquiry(s)** Client Consent Form



- The Result Screen will show as *Pending* until the Client has responded to the request.

Thank you, your request has been received

**YOU WILL BE NOTIFIED AS SOON AS YOUR CLIENT PROVIDED CONSENT**

Transaction Number	Id/Passport Number	Client Name	Date of Birth	Content Providers	Transacting As	Result	Reason
CCP-2018/01/11-2	7410017000082	OH Dear	01 Oct 1974	ABSA Life, Discovery Life, FMI, Holland Life, Liberty Group Limited, Liberty Group Limited (CAL), Metropolitan, Momentum, Nedbank Insurance, Old Mutual South Africa, PPS, Sanlam, Allan Gray (Manco & LISP), Discovery Invest, Momentum Wealth, Old Mutual Wealth, STANLIB, Old Mutual Unit Trusts, Sanlam Collective Investments	Astute Staff	Pending	Pending Digital Consent

*All notifications will be sent to you via email*

*No responses will be shown. Transaction has not been processed*

*View all clients you requested Digital Consent for*

My Clients | View My Transactions

*At this stage, the transaction has not been processed. You will not be able to proceed with this transaction until the Client responds!*

- Educate your Clients that they will receive an SMS with a link to *Accept* or *Decline* the request.

**1** Client to click the link in the SMS to Accept / Decline

**2** Client clicking 'Accept' on the mobile app interface.



- Once the Client has responded, **you will receive an email** from Astute Online to confirm the outcome of the request.

Digital Consent Status Approved

Dear Astute Training,

Client Details : OH Dear  
ID Number : 7410017000082

This serves to confirm that the abovementioned client **approved** consent via the Astute Digital Consent process.

Transaction Number CCP-2018/01/11-2 is now processing and you can access the client portfolio under the CCP "My Transactions" tab on [www.astutefse.com/online](http://www.astutefse.com/online)

Should you have received this email in error kindly advise the Astute Service Desk on [support@astutefse.com](mailto:support@astutefse.com).

- **On Astute Online**, navigate to **My Clients** button (from the **Home-screen** or **CCP > My Clients**) to view the response or navigate to My Transactions page.

**(Refer to the 2<sup>nd</sup> attachment for more details)**

