



 **Sanlam**
Live with confidence

BIBC RF

Member session February 2025

ADMINISTRATION WORK-FLOW

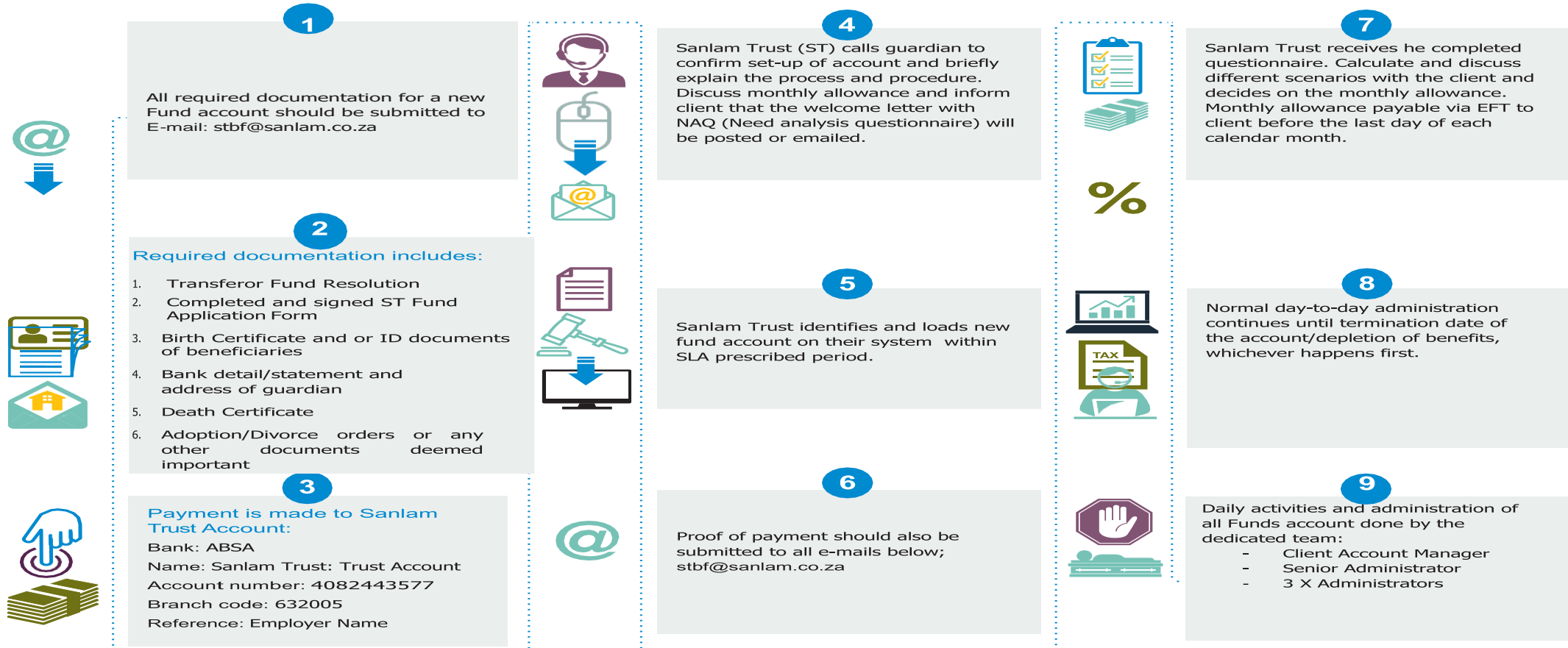
Sanlam Trust Beneficiary Funds and Umbrella Trusts



FIDUCIARY SERVICES



SANLAM TRUST ADMINISTRATION WORKFLOW (BF and UT)



SERVICE AND COMMUNICATION



Effective
communication



Benefit statements
sent annually or
available upon
request



Tracing of
Guardians and
Beneficiaries

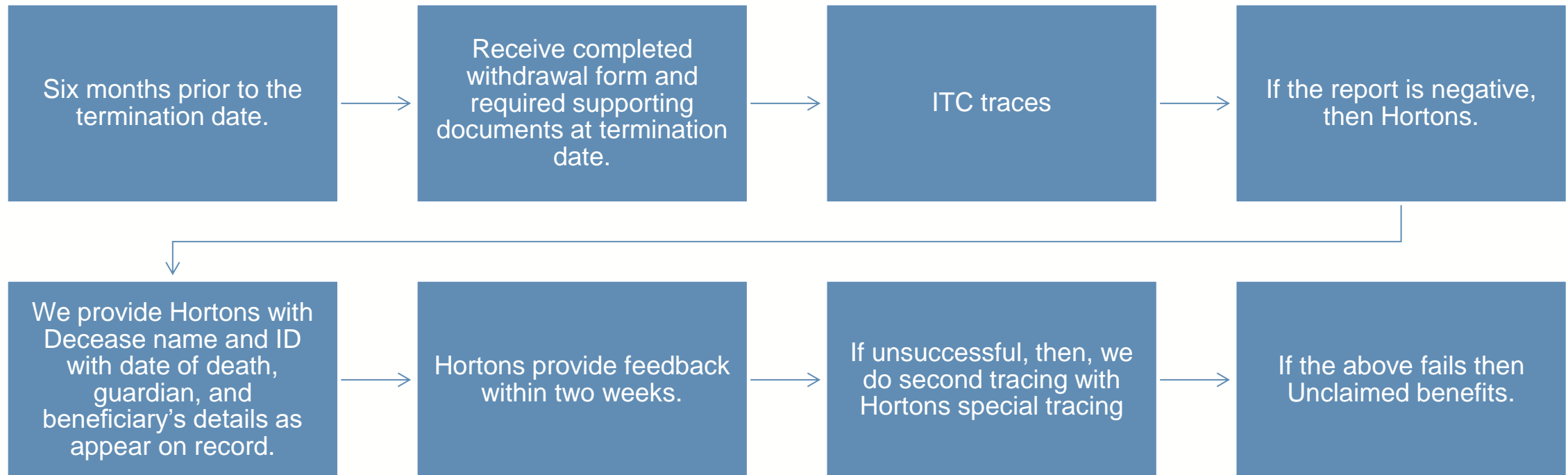


One-stop service via a
toll free number
0800 212 382





TRACING



HOW WE ADD MORE VALUE



- Annual alive status verification
- Guardian information booklet on their role as a guardian
- Financial education for guardians
- Joint Sanlam CSI and Fund Wellness days
- Guardian educational roadshows
- SmolApp (Smart mobile learning application)
- Countrywide access to Sanlam offices and facilities



Questions?



Thank you.