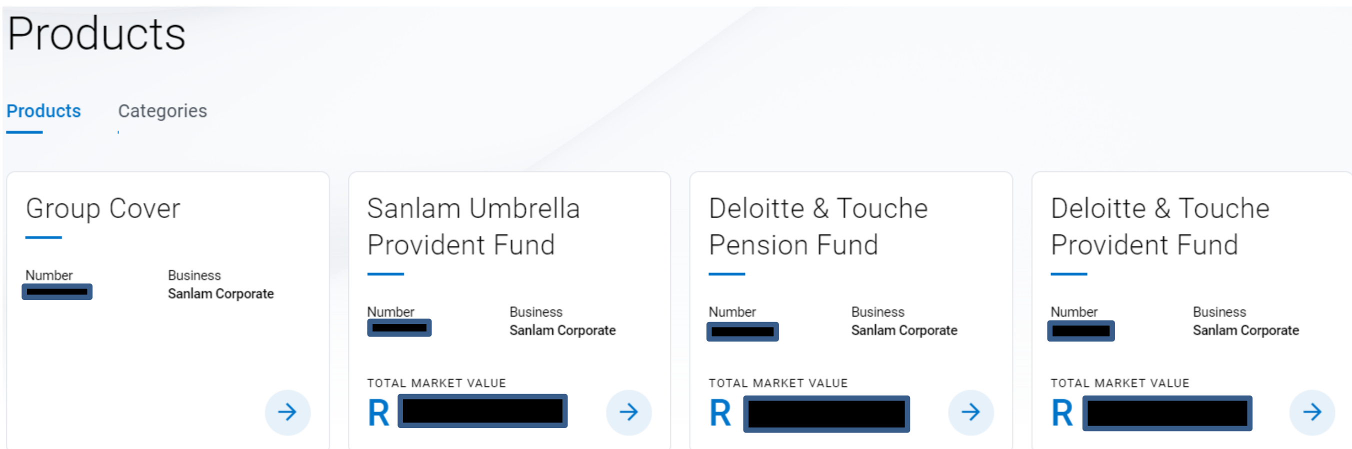
SANLAM UMBRELLA PROVIDENT FUND

Member Portal guide

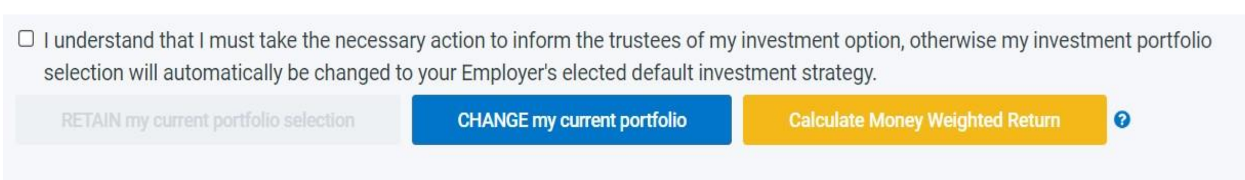
1. Investment portfolio confirmation and switches

Click on the arrow for **Sanlam Umbrella Provident Fund**

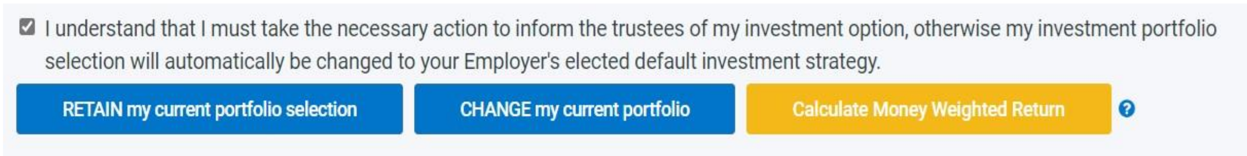


Once in your **Sanlam Umbrella Provident Fund** profile, go to "My Investments" on the menu options.

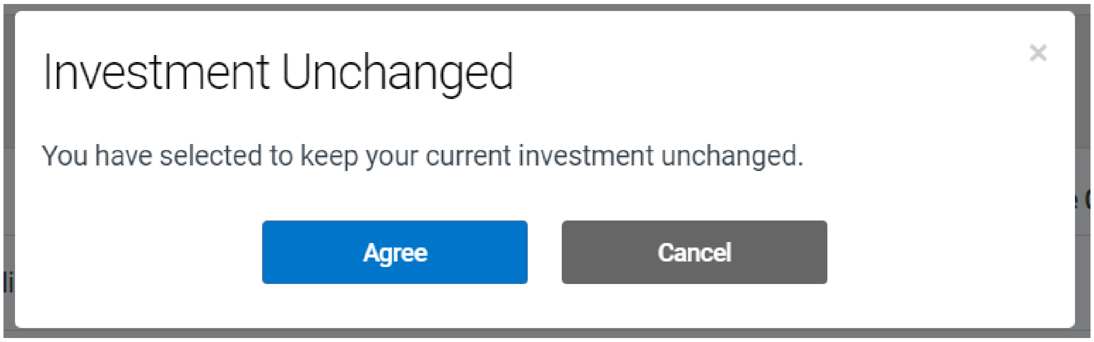
Click on the "tick box" to acknowledge your understanding of the requirement to confirm your investment option.



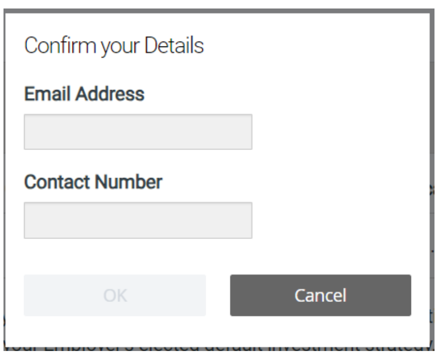
Select “RETAIN my current portfolio selection” if you are comfortable with your investment choice or “CHANGE my current portfolio” if you would like to change it.



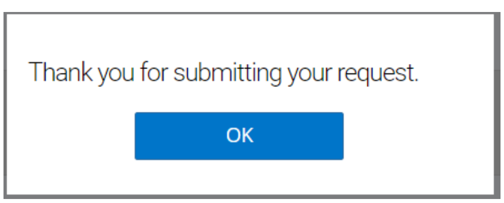
If you select “RETAIN my current portfolio selection”, you will then be prompted to Agree or Cancel.



If you Agree, you will be asked to confirm your details.

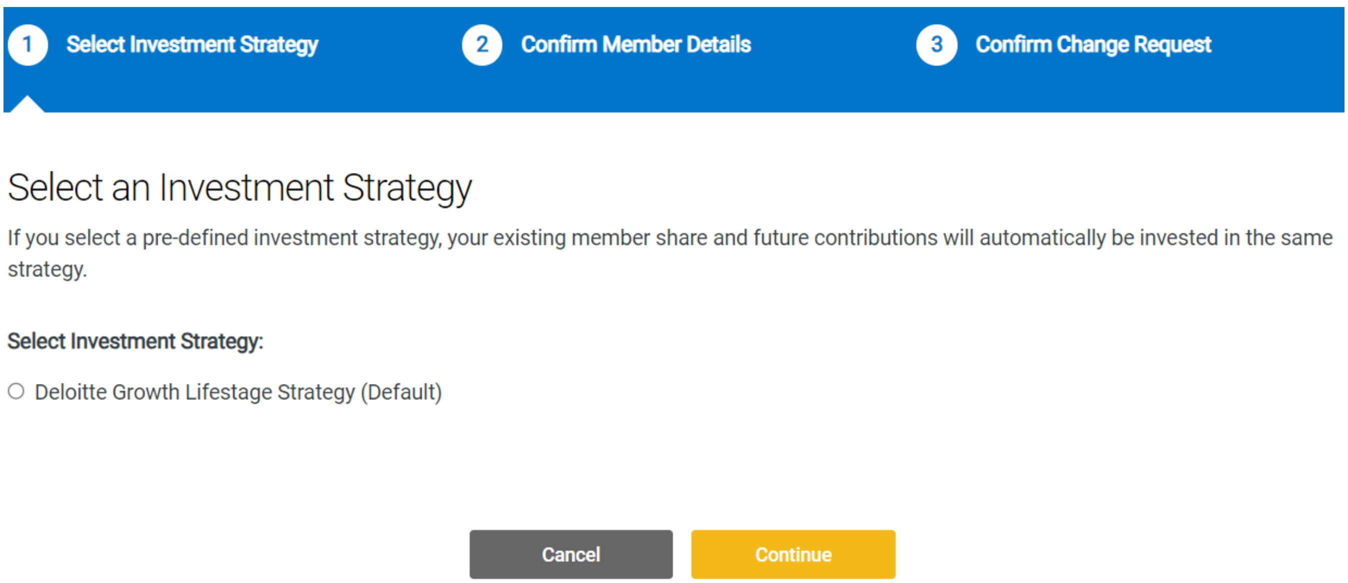


After you have confirmed your details you will get the below message.



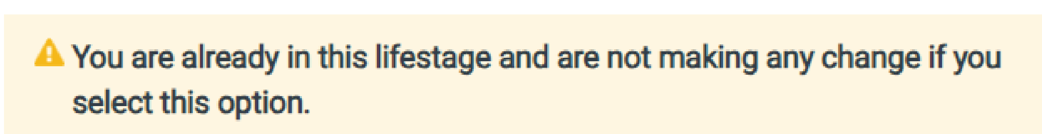
If you select “CHANGE my current portfolio”, you will need to choose “I want to select a pre-defined Trustee Investment Strategy” or “I want to select my own portfolios”.

If you select “I want to select a pre-defined Trustee Investment Strategy” you will be able to choose one of the Deloitte Lifestage strategies.



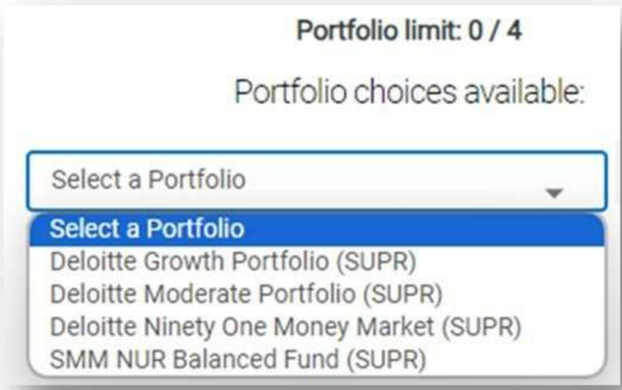
Please note:

- If you elect to invest in a Lifestage Strategy that they are already invested in, the below message will be displayed just below the Investment Strategy selection and you will need to choose to Cancel or Continue.



- The Deloitte Capital Preservation Lifestage Strategy is unfortunately not currently reflecting on the member portal. Sanlam are aware of this and are in the process of addressing the issue. It is anticipated that this will reflect on the member portal as an investment option by no later than 7 June 2024.

If you select “I want to select my own portfolio’s” you will be able to choose to invest in any of the member choice portfolios reflected below, or a combination thereof. Note your total allocation must equal 100%.



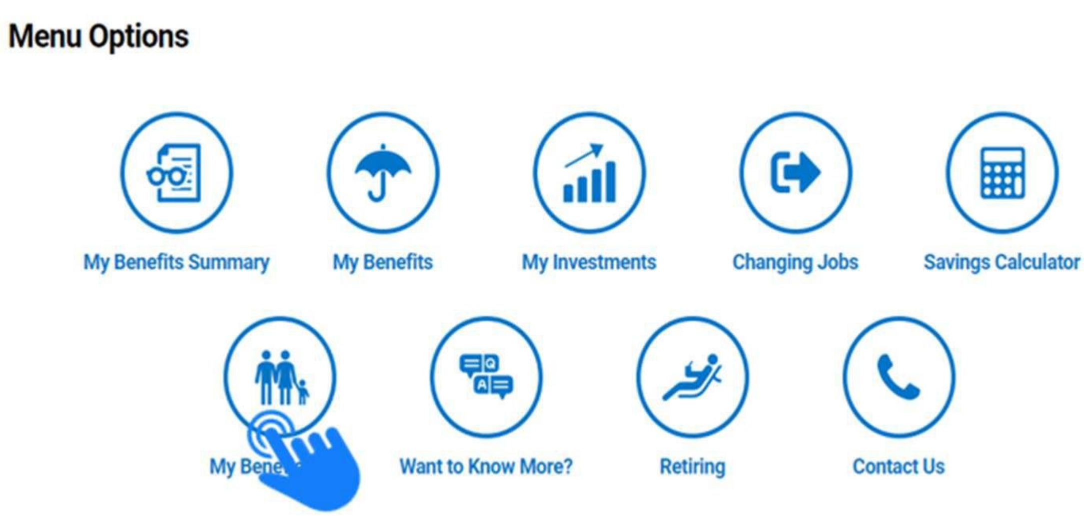
Click Submit once you are happy with your choices.

Please note that your switch instruction will be processed within 5 working days and a confirmation of your switch will be sent to you.

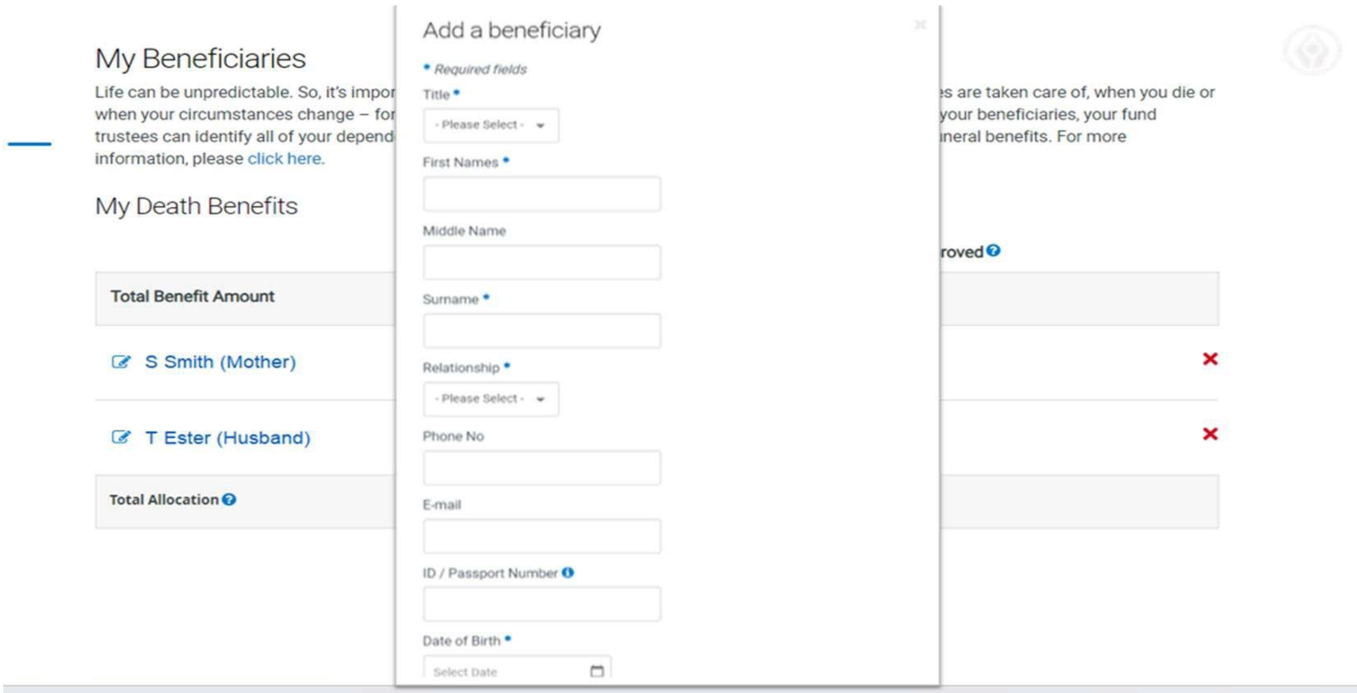
2. Updating your Beneficiary Nominations

Note you need to do this separately for each of the three funds.

Go to “My Beneficiaries” on the Menu Options



Click on “Add a Beneficiary" to open the nomination form:



Complete the required information and click on the “Done” button.

Please note:

- Your beneficiary allocation must add up to 100%. A warning message will show if the total allocation does not add up to 100%.
- Your changes will reflect on the member portal within 24 to 48 hours and will also appear on your benefit statement.

Should you require any assistance with your registration or navigation on the Member Portal, please feel free to contact the Sanlam Client Care Centre on 0861 223 646 or our digital support team on SCDigitalSupport@sanlam.co.za.