

SANLAM UMBRELLA PROVIDENT FUND

Member Portal guide

1. Investment portfolio confirmation and switches

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

Products

Products Categories

Group Cover

Number [REDACTED] Business Sanlam Corporate

Sanlam Umbrella Provident Fund

Number [REDACTED] Business Sanlam Corporate

TOTAL MARKET VALUE R [REDACTED]

Deloitte & Touche Pension Fund

Number [REDACTED] Business Sanlam Corporate

TOTAL MARKET VALUE R [REDACTED]

Deloitte & Touche Provident Fund

Number [REDACTED] Business Sanlam Corporate

TOTAL MARKET VALUE R [REDACTED]

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

My Benefits Summary

My Benefits

My Investments

Changing Jobs

Savings Calculator

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

I understand that I must take the necessary action to inform the trustees of my investment option, otherwise my investment portfolio selection will automatically be changed to your Employer's elected default investment strategy.

RETAIN my current portfolio selection

CHANGE my current portfolio

Calculate Money Weighted Return



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.

I understand that I must take the necessary action to inform the trustees of my investment option, otherwise my investment portfolio selection will automatically be changed to your Employer's elected default investment strategy.

[RETAIN my current portfolio selection](#) [CHANGE my current portfolio](#) [Calculate Money Weighted Return](#) 

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

Investment Unchanged x

You have selected to keep your current investment unchanged.

[Agree](#) [Cancel](#)

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

Confirm your Details

Email Address

Contact Number

[OK](#) [Cancel](#)

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

Thank you for submitting your request.

[OK](#)

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”.

Select New Investment Strategy

You can either select to invest in one of the pre-defined trustee investment strategies or you can select your own portfolios from the approved list.



I want to select a pre-defined Trustee Investment Strategy



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.

1 Select Investment Strategy 2 Confirm Member Details 3 Confirm Change Request

Select an Investment Strategy

If you select a pre-defined investment strategy, your existing member share and future contributions will automatically be invested in the same strategy.

Select Investment Strategy:

Deloitte Growth Lifestage Strategy (Default)

Cancel

Continue

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.

⚠ You are already in this lifestage and are not making any change if you select this option.

- 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%.

Portfolio limit: 0 / 4

Portfolio choices available:

Select a Portfolio ▼

Select a Portfolio

- Deloitte Growth Portfolio (SUPR)
- Deloitte Moderate Portfolio (SUPR)
- Deloitte Ninety One Money Market (SUPR)
- SMM NUR Balanced Fund (SUPR)

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

Menu Options



My Benefits Summary



My Benefits



My Investments



Changing Jobs



Savings Calculator



My Beneficiaries



Want to Know More?



Retiring



Contact Us

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

My Beneficiaries
Life can be unpredictable. So, it's important to make sure your beneficiaries are taken care of, when you die or your circumstances change – for your beneficiaries, your funeral benefits. For more information, please [click here](#).

My Death Benefits

Total Benefit Amount

- [S Smith \(Mother\)](#)
- [T Ester \(Husband\)](#)

Total Allocation

Add a beneficiary

*** Required fields**

Title *
- Please Select -

First Names *

Middle Name

Surname *

Relationship *
- Please Select -

Phone No

E-mail

ID / Passport Number ⓘ

Date of Birth *
Select Date

es are taken care of, when you die or your beneficiaries, your funeral benefits. For more

proved ⓘ

X

X

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.