

Member and pensioner communication services



About Retirement Fund Administration

One might think that retirement fund administration is all about collecting contributions and paying benefits.

At Sanlam it's far more than that! For us, it is about designing and managing retirement fund administration solutions for over 630 000 members, providing a cost-effective and secure IT platform and communicating with members and trustees in a way that is easy to understand.

We strive to administer retirement funds in such a way that each fund member understands the reason for retirement savings, financial goal-setting and investment strategies to ensure financial independence at retirement.

Retirement fund members have increasingly become responsible for planning their own retirement. As a result, they need appropriate solutions and regular encouragement to assess their retirement benefits and other investments.

Sanlam Employee Benefits' retirement fund administration team takes care of every aspect of fund.



Why choose Sanlam's Member and Pensioner Communication Service?



Sanlam Employee Benefits understands that each retirement fund is different. For this reason, we believe in taking the time to get to know a fund before developing a tailor-made communication solution. By doing so, we can create the ideal solution and strategy to inform and educate your members, while working within your budget.



We can do everything from setting up your fund's communication strategy and policy documents, to the branding of all media, and managing the project plan itself. Below is a list of services we are able to deliver on:



Project management

Once a communication strategy has been agreed on, we can set up the communication year plan. This can be managed on an ongoing basis to ensure that all initiatives are successfully launched, run and completed. Should you choose to run with your own strategy and need assistance on certain projects or campaigns, Retirement Fund Administration has the expertise to do so.

Member booklet

In our experience, member booklets have proved to be simple but effective. We are able to create a member booklet (or convert your existing booklet) into a print-friendly PDF version or e-booklet for your fund's website or your employer's intranet site.

A fund website

It is becoming increasingly important for retirement funds to have a dedicated fund website. We can work with you to design and create a website to meet your fund's specific needs. Our standard design includes interactive tools such as calculators, a link to the fund administrator's member secure website, rotating flash header, RSS feeds, search function, scrolling banner, advert box, voting polls and/or quizzes, hit counter, an informal online survey and much more!

The site architecture can be versatile and incorporate various information such as pages for fund rules, fund communication, documents, forms, information on other service providers, newsletters, annual reports, information on the board of trustees, frequently asked questions and investment reporting, etc.

Managing your website and appointing a webmaster

Not only can we arrange to host your site, we can also be appointed as 'webmasters', making it our responsibility to ensure your site is updated regularly. For example, we can load investment information and annuity rates for the calculators monthly, change the voting polls or quizzes on a regular basis, load updated forms, information and documents etc. We would typically also manage the help desk facility (i.e. the 'contact us' functionality) and undertake all necessary website maintenance.

Creating laptop and desktop pop-ups and plasma screen adverts

Many funds like to do high profile marketing for certain campaigns and will run adverts on plasma screens in their reception areas for a few days. Some funds even have their IT division install our pop-up designs on their desktops and laptops (usually a once-off exercise).

Creating internet picture banners

We can create internet picture banners as a marketing tool to load on your employer's intranet site.

Creating Facebook and Twitter profiles for your fund

We take the necessary administration and maintenance of these social media pages off your hands.

Job aids

From office stationery such as pens and calendars, to fridge magnets and mugs, we can brand just about anything that strikes your imagination.

Z Cards

For the less electronically minded, we can summarise your member benefits on a credit card sized pamphlet.



Fund Newsletters

Whether you would like to generate your own newsletters or whether you would like us to, we are able to write and design them. If you are tired of printing and distributing newsletters, we can handle the entire process on your behalf. This includes setting up an electronic version and distributing it via bulk email, if required, as frequently as you like.

Trustee reports

This is usually an annual report in hard copy only, with a PDF version stored on the fund's website, or the employer's intranet. We are able to put this together from start to finish – provided that the fund sends us the necessary information. If required, we can also manage the printing and distribution of your trustee report.

Trustee elections

We offer a trustee nomination and election communication service to help you manage your trustee election campaign.

Member information sessions and roadshows

We can address groups of members on specific issues, visit member premises to see people one-on-one, or hold induction sessions as often as you require. Our pre-retirement sessions for members who are up to 10 years from retirement have proved to be helpful. We suggest running these sessions every second year. Member roadshows are an ideal way for retirement funds to interact with its members.

Bulk email and SMS

Distributing electronic information in a bulk format is something we are often asked to do. Using SMS functionality is also a helpful reminder and information tool.

Member statements

Member statements are an important tool in retirement planning. We are able to compile and design your annual benefit or projection statements. We are also able to compile and design explanatory statements for members to help them understand their benefit or projection statements, and show them how to complete their beneficiary nomination forms.

Posters and flyers

This is still an effective way to communicate with fund members. We can help you to create awareness and grab attention – even in this electronic age!

Education simulation

This online game, played over a six-week period, is an interesting and innovative way to create awareness and understanding of saving and investing. The link can be opened at certain times only, to limit user access and as to not impact on members' productivity.

Greeting cards and calendars

We can assist with the distribution of greeting cards and calendars.



More information

If you require more information on this product offering, please contact:

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