

Benefits of taking out a will with Sanlam as a member of the Sanlam Umbrella Fund



As Sanlam Umbrella Fund, we understand the importance of a will as a true reflection of your last wishes and assuring that your assets are distributed accordingly. That is why we have introduced a **free will drafting service** as part of our **value-added offering** to our members.





Benefits to members:



Free will drafting in plain, simple and **understandable language**



Will **clauses updated continuously** in accordance with new legislation and case law



Draft will, will be **ready in 3 working days** after receipt of all information



Member will be **kept informed** at every stage of the drafting process



Reminders to **review their will** every second year



Member can **safe keep the will** at a competitive annual fee



Member can **request** drafting of a **Shariah compliant will** if required



Member can **negotiate discount on executor's fees** and these will be documented in your will



Members will be assisted in **updating the beneficiary nomination** forms

Note: A beneficiary nomination form is important because Fund benefits, such as retirement savings, are governed by the Pension Funds Act and cannot be included in member's will.

Fees:

FREE



FREE
drafting of your will

FREE



FREE
revision of your will

FREE



FREE
quality and control check



Safe Custody fee of R50 per annum (excl. Vat)



NEGOTIABLE
executors fees.
An additional 5% fee discount is applicable if a member elects Sanlam's Safe Custody Service.

Members can contact the Sanlam Umbrella Fund member call centre on:

086 122 3646 or email us on SCClientcare@sanlam.co.za

OR Chat to us via our WhatsApp number: 086 122 3646