



Live with confidence

# Sanlam Umbrella Fund Value Added Benefits

Member Brochure

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[Financial Planning](#) | [Investments](#) | [Insurance](#) | [Health](#) | [Retirement](#) | [Wealth](#)



# What are the Value Added Benefits?

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# What are the Value Added Benefits?



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# What are the Value Added Benefits?



## Free Retirement Benefit Counselling Services

- Support and guidance for retirement planning
- Reactive and proactive counselling services
- Over-the-phone Fund information
- Multilingual benefit counsellors
- Accessible via multiple channels; telephone, SMS & email

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# What are the Value Added Benefits?



## Free Will Drafting Service

- Support and guidance for retirement planning
- Free drafting of Wills
- Free telephonic consultation
- Free revision of Wills
- Free quality and control checks for your revised Will
- Safe custody of Wills
- Assistance updating your beneficiary nomination forms

Access this service via the [Sanlam Member Portal](#), or Sanlam My Retirement App

Contact member call centre at **086 122 3646** , or email them at [SCClientcare@sanlam.co.za](mailto:SCClientcare@sanlam.co.za)

[Click here](#) to access the brochure.



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# What are the Value Added Benefits?



## Free Sanlam Virtual Doctor Consultations

- Access to free Virtual GP Consultations
- Access to free Virtual Nurse Consultations
- Book a consultation from anywhere, via your cell phone or computer
- No medical aid required

Access this service via the [Sanlam Member Portal](#), or Sanlam My Retirement App

Contact member call centre at 086 122 3646 , or email them at [SCClientcare@sanlam.co.za](mailto:SCClientcare@sanlam.co.za)

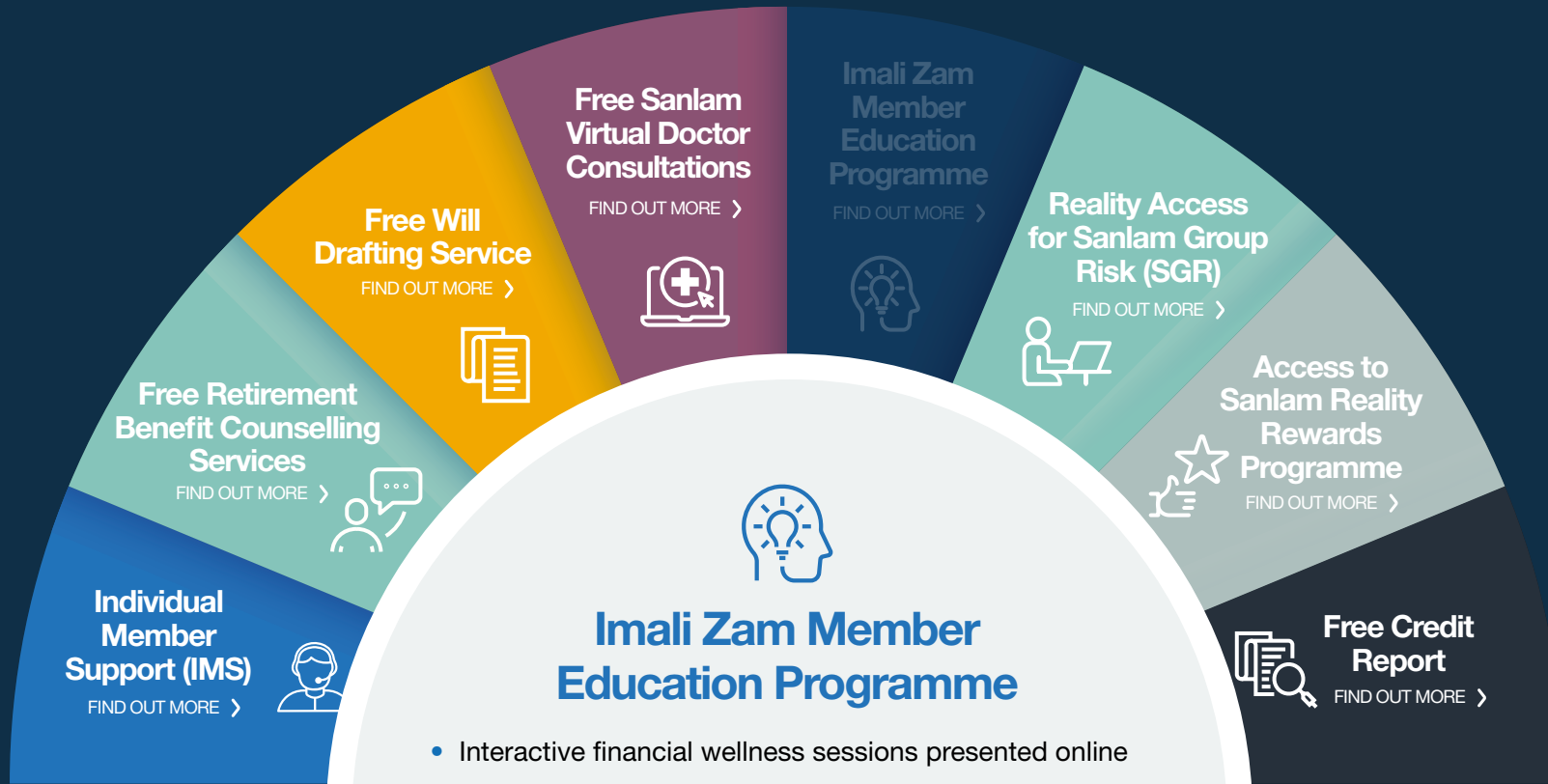
[Click here](#) to access the brochure.



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# What are the Value Added Benefits?



- Interactive financial wellness sessions presented online
- Designed to help you to understand your retirement savings and benefits
- Covers wide ranging topics to help you along your retirement savings journey

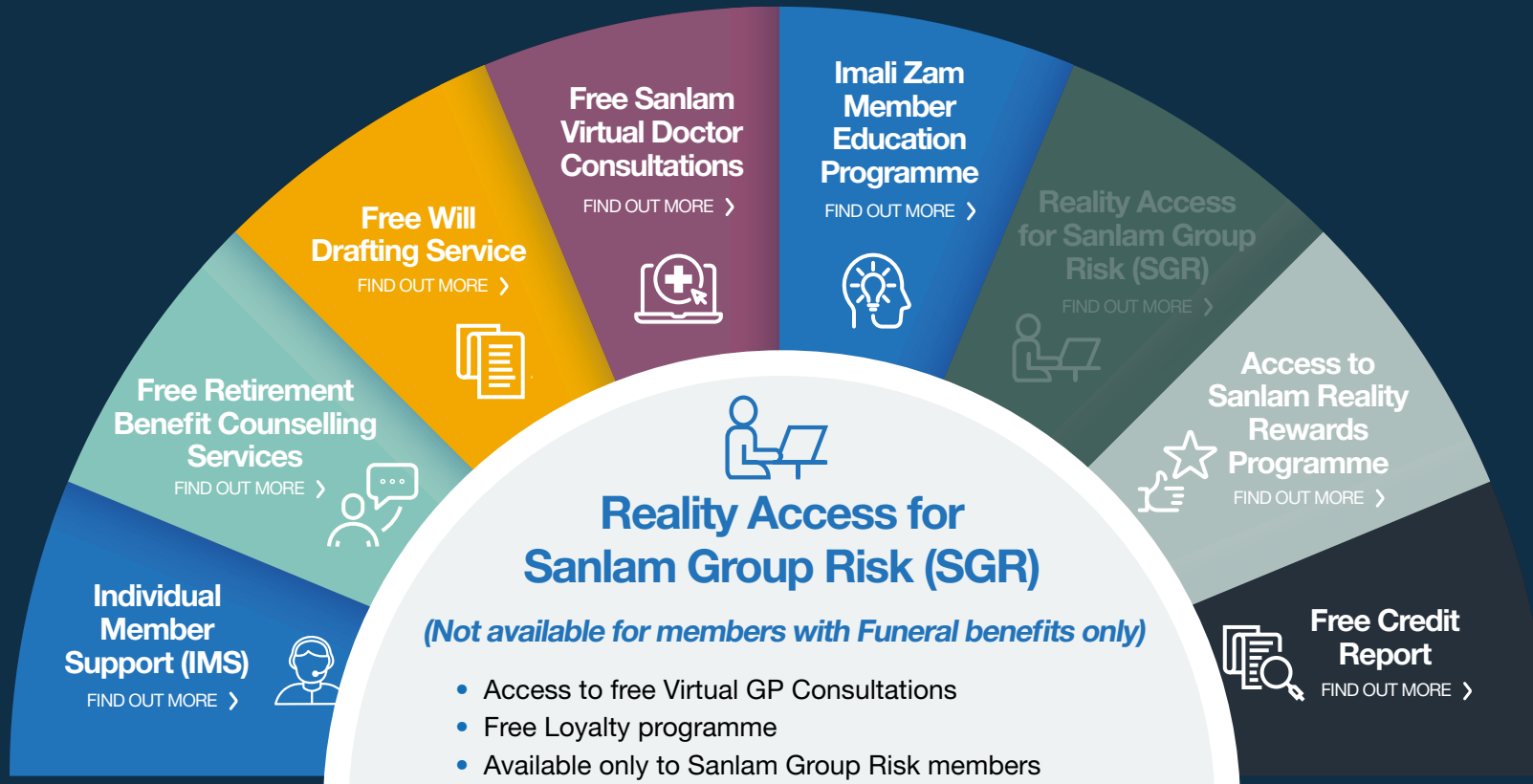
**Lookout for the invite when these sessions take place.**

[Click here](#) to access previous Imali Zam sessions.

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# What are the Value Added Benefits?



## Reality Access for Sanlam Group Risk (SGR)

*(Not available for members with Funeral benefits only)*

- Access to free Virtual GP Consultations
- Free Loyalty programme
- Available only to Sanlam Group Risk members
- Burial repatriation & funeral services
- Legal Assist
- Emergency Medical response
- Trauma, HIV & Assault Assist
- Discount Coupons
- Access to [Wealth Sense](#)

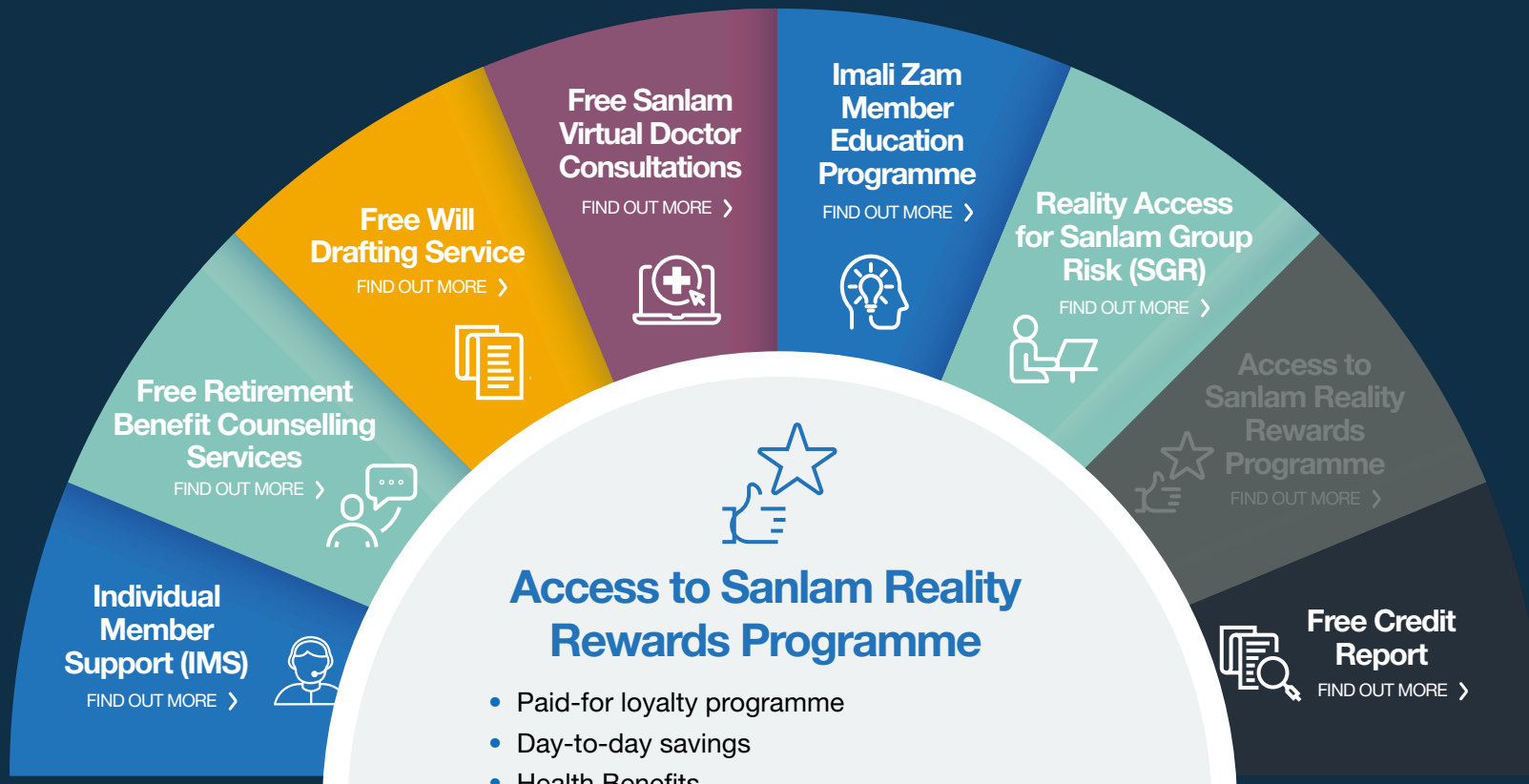
[Click here](#) to access the brochure. If you qualify for this service, log in to the [Sanlam Member Portal](#) and choose the: **Reality Access for Sanlam Group Risk** tile.

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# What are the Value Added Benefits?



## Access to Sanlam Reality Rewards Programme

- Paid-for loyalty programme
- Day-to-day savings
- Health Benefits
- Entertainment benefits
- Wealth benefits
- Travel benefits

Register on the [Sanlam Reality](#) website to access these benefits. Once you've registered, you can access the programme via the [Sanlam Member Portal](#) by selecting the Sanlam Reality Rewards Programme tile.



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# What are the Value Added Benefits?



## Free Credit Report

- Find out your current credit score
- Access a monthly credit dashboard to understand your credit profile
- Link your bank accounts and see all your financials in one convenient place
- Track your account activity and interest rate payments
- Check if you can consolidate your credit and free up cash flow
- See if there is suspicious activity on your account
- Use the Sanlam budget tool to keep track of your spending
- Explore a range of financial and credit products suitable for you

Access this service through the [Sanlam Member Portal](#) and click “Go to” at the top left corner of the landing page.

# Powerful online tools



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benefits**

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**Day One Tools**

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**Self-service  
WhatsApp Chat**

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**Sanlam  
Member Portal**

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**Mobile App**

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**Sanlam  
knowledgebase**

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# Powerful online tools



## Day One Tools

- **Replacement Ratio Calculator**, projects your retirement outcome and suggests what you can do to improve it.
- **Day-One video**: explains both the calculator and how a retirement fund works.

[Click here to access the Day-One video](#)



### Day One Tools

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### Self-service WhatsApp Chat

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### Sanlam Member Portal

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### Mobile App

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### Sanlam knowledgebase

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### Value added benefits

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# Powerful online tools



## Sanlam Member Portal

- Daily updated member benefit values
- Member benefit statements
- Interaction with Sanlam
- Educational content
- Retirement calculator
- Access to Sanlam Umbrella Fund's value-added benefits
- And other functions related to your retirement information.

[Register here](#) or [login](#) on the **Member Portal** to access your information.

Follow this [Step-by-Step Registration Guide](#) or [watch this video](#) to learn how the portal works.



## Day One Tools

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## Sanlam Member Portal

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## Mobile App

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## Sanlam knowledgebase

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## Self-service WhatsApp Chat

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## Value added benefits

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# Powerful online tools



## Mobile App

You get direct access to valuable information and insights via the free **Sanlam My Retirement App**, available for download on Apple and Android. You have access to the exact same information as the member portal, including:

- Daily updated member values
- Breakdown of your investments
- A wide range of fund performance fact sheets
- And other functions related to your retirement information



## Day One Tools

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## Self-service WhatsApp Chat

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## Sanlam Member Portal

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## Mobile App

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## Sanlam knowledgebase

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## Value added benefits

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# Powerful online tools



## Sanlam Knowledgebase

Access helpful content created to simplify and answer questions you may have about your retirement benefits. The platform features multimedia content covering topics such as:

- Saving for retirement
- Retirement Fund membership explained
- Life events
- Changing jobs
- Retiring
- Disability
- Critical illness
- Divorce
- Death

[Click here access  
the Knowledgebase](#)



### Day One Tools

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### Self-service WhatsApp Chat

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### Sanlam knowledgebase

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# Powerful online tools



## Self-service WhatsApp Chat

- Check your claim status
- Check your retirement fund values
- Get help with online registration
- Access information about your options when resigning or retiring from your employer

Send



to **086 122 3646** to  
start chatting to us.



### Day One Tools

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### Value added benefits

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[www.sanlam.co.za](http://www.sanlam.co.za)

