

General fund information

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Regulatory Information for Sanlam Umbrella Pension Fund & Sanlam Umbrella Provident Fund

Statutory alternatives	Fund status	
Registered name	Sanlam Umbrella Pension Fund Sanlam Umbrella Provident Fund	
Registered as an	Umbrella Pension Fund and Umbrella Provident Fund (identical benefit and management structures)	
Umbrella Sponsor	Sanlam Life Insurance Ltd	
Umbrella Sponsor VAT number	4690107646	
	Pension Fund:	Provident Fund:
Registration date	19/09/2001	19/09/2001
Approval date	06/02/2002	06/02/2002
Registration number	12/8/36828	12/8/36813
Approval number	18/20/4/41146	18/20/4/41147
Funding model	Defined Contribution Funds	
The Fund's financial reporting period	From 1 January to 31 December	
Fund exemptions	Valuation exempt, not audit exempt from 1 January 2008. Received valuation exemption for Pension Fund and Provident Fund from 1 January 2023 up to 31 December 2025.	
The Fund's registered postal address	PO Box 1, Sanlamhof, 7532	
The Fund's registered physical address	2 Strand Road, Bellville, Cape Town, 7532	
Separate bank accounts are being maintained for each fund	Pension Fund: ABSA, Centurion Acc no: 4067972456	Provident Fund: ABSA, Centurion Acc no: 4067972383

Fund Officers for Sanlam Umbrella Pension Fund & Sanlam Umbrella Provident Fund

	Principal officer	Responsible person
Full name	Joelene Moodley	Shamiega Manuels
Company	Independent	Sanlam Corporate: Umbrella Solutions
Postal address	PO Box 1, Sanlamhof, 7532	
Physical address	2 Strand Road, Bellville, Cape Town, 7532	
Telephone number	082 564 0341	(021) 947-6504
Email address	joelene.moodley@sanlam.co.za	shamiega.manuels@sanlam.co.za

	Information Officer	Deputy Information Officer
Full name	Joelene Moodley	Virgil Prinsloo
Company	Independent	Sanlam Corporate: Umbrella Solutions
Postal address	PO Box 1, Sanlamhof, 7532	
Physical address	2 Strand Road, Bellville, Cape Town, 7532	
Telephone number	082 564 0341	(021) 950-4608
Email address	joelene.moodley@sanlam.co.za	virgil.prinsloo@sanlam.co.za

Professional service providers

Independent external auditor	Sanlam Umbrella Pension Fund and Sanlam Umbrella Provident Fund
Company	RSM South Africa Inc.
Postal address	PO Box 1734, Randburg, 2194
Physical address	Cross Street & Charmaine Avenue, President Ridge, Randburg, 2194
Telephone number	(011) 329-6000

Appointments for Sanlam Umbrella Pension Fund & Sanlam Umbrella Provident Fund

	Administrator	Sponsor
Company	Sanlam Life Insurance Ltd Sanlam Corporate: Core Solutions	Sanlam Life Insurance Ltd Sanlam Corporate: Umbrella Solutions
Postal address	PO Box 1, Sanlamhof, 7532	PO Box 1, Sanlamhof, 7532
Physical address	2 Strand Road, Bellville, Cape Town	2 Strand Road, Bellville, Cape Town
Telephone number	(021) 947-9111	(021) 947-1125
Reg number S13B / FAIS	24/85	24/85

	Secretariat	Consultant: Governance & Compliance
Responsible person	Shamiega Manuels	Joelene Moodley
Company	Sanlam Corporate: Umbrella Solutions	Independent
Postal address	PO Box 1, Sanlamhof, 7532	
Physical address	2 Strand Road, Bellville, Cape Town	
Telephone number	(021) 947-6504	082 564 0341
Email address	shamiega.manuels@sanlam.co.za	joelene.moodley@sanlam.co.za

Specialist Investment Consulting

	Sanlam Umbrella Pension Fund and Sanlam Umbrella Provident Fund	
Responsible person	Willem le Roux	Victor Faria
Company	Simeka Consultants & Actuaries	Independent Actuarial Consultants
Postal address	PO Box 350, Sanlamhof, 7532	PO Box 1172, Cape Town, 8000
Physical address	Simeka House, Farm 2, Vineyards Office Estate, 99 Jip de Jager, Bellville, 7535	6th Floor, Wale Street Chambers, 38 Wale Street, Cape Town, 8000
Telephone number	(021) 912-3324	(021) 422-4373
Email address	willem@simekaconsult.co.za	victor@iac.co.za
Reg number FAIS	Simeka FAIS Licence No 13900	IAC FAIS Licence No FSP: 6832

Risk Insurers

	Sanlam Umbrella Pension Fund and Sanlam Umbrella Provident Fund	
Company	Sanlam Life Insurance Ltd	ABSA Life
Postal address	PO Box 1, Sanlamhof, 7532	PO Box 421, Johannesburg, 2000
Physical address	2 Strand Road, Bellville, Cape Town	3 rd Floor, Absa Towers North, 180 Commissioner Street, Johannesburg, 2001
Telephone number	(021) 947-9111	0860 227 253
FSCA approval number	24/185	36116
Type of risk	Group Life, Disability, Funeral, Accident, Spouse's and Critical Illness	Group Life, Disability, Funeral, Accident, Spouse's and Critical Illness