



## Member Guide – switch process

Members should log on to the Sanlam member portal, once logged in, the following screen will appear:

### Portfolio

#### Retirement Funding

**Sanlam Umbrella Provident Fund**  
Sanlam Employee Benefits  
39283310

Total Market Value  
**R 256 377.88**

[View your retirement fund and/or group risk detail](#) 

Click on [View your retirement fund and/or group risk detail](#), and on the next page, select [My Investments](#):

### Home



My Benefits Summary



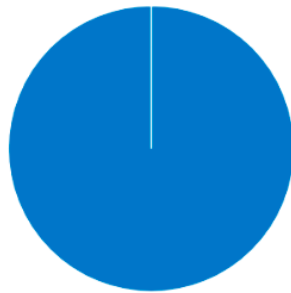
My Benefits



My Investments

A graph will be displayed which indicates your current member share,  
Existing Member Share Balance

Sanlam Umbrella Provident Fund: Bigen Africa Services (Pty) Ltd



|               |              |       |
|---------------|--------------|-------|
| Total Amount: | R 256 377.88 | 100 % |
|---------------|--------------|-------|



| Portfolio                                     | Current Balance | Existing Member Share Allocation | Future Contributions Allocation |
|---|-----------------|----------------------------------|---------------------------------|
| ■ SIS LIFE inflation plus 5 - 7 strategy Prov | R 256 377.88    | 100.00 %                         | 100.00 %                        |

REQUEST A CHANGE

Click on the button “Request a change”, then select “I want to select my own portfolios”:

 Review Investment Choices

# Investment Choice Request

  More Information

## Select New Investment Strategy

You can select your own portfolios from the approved list.



I want to select my own  
portfolios

Then click on My existing member share, and then continue,

1 Select Own Portfolios    2 Make new allocations    3 Confirm Member Details    4 Confirm Change Request

### Select Own Portfolios

I want to change:

- My existing member share ?
- Future Contributions ?
- Both

CANCEL    CONTINUE

Then select the applicable portfolio/s and percentage/s and once done, press the Add button and then click on continue:

### Make new allocations

Amount of member share available for new allocations

| <b>Total Amount:</b><br>Your total allocation must equal 100% | R 256,377.88    | <b>100%</b>    |
|---|-----------------|----------------|
| Portfolio   | Current Balance | New Allocation |
| SIS LIFE inflation plus 5 - 7 strategy Prov                   | R 256,377.88    | 0.00 %         |
| SIS LIFE inflation plus 1 - 3 strategy Prov                   | R 0.00          | 100.00 % ✕     |

Portfolio limit: 1 / 4

Portfolio choices available:

Select a Portfolio    ADD

RESET ALLOCATIONS

Once done, confirm your email address and mobile number.

## Confirm Member Details

Email Address \*

Mobile Number: \*

I have read and understand the [terms and conditions](#)

CANCEL

BACK

CONTINUE

Thereafter, select the changes required for Future contributions, and select continue:

## Select Own Portfolios

**I want to change:**

- My existing member share [?](#)
- Future Contributions [?](#)
- Both

CANCEL

CONTINUE

Then select the applicable portfolio/s and percentage/s and once done, press the Add button and then click on continue:

### Future Contributions

| <b>Total:</b>                               |           | <b>100%</b>        |
|---|-----------|--------------------|
| Portfolio                                   | Current % | New Contribution % |
| SIS LIFE inflation plus 5 - 7 strategy Prov | 100%      | 0.00 %             |
| SIS LIFE inflation plus 1 - 3 strategy Prov | 0%        | 100.00 % ✕         |

Portfolio limit: 1 / 4

Select a Portfolio

Once done, confirm your email address and mobile number.

### Confirm Member Details

Email Address \*

Mobile Number: \*

I have read and understand the [terms and conditions](#)