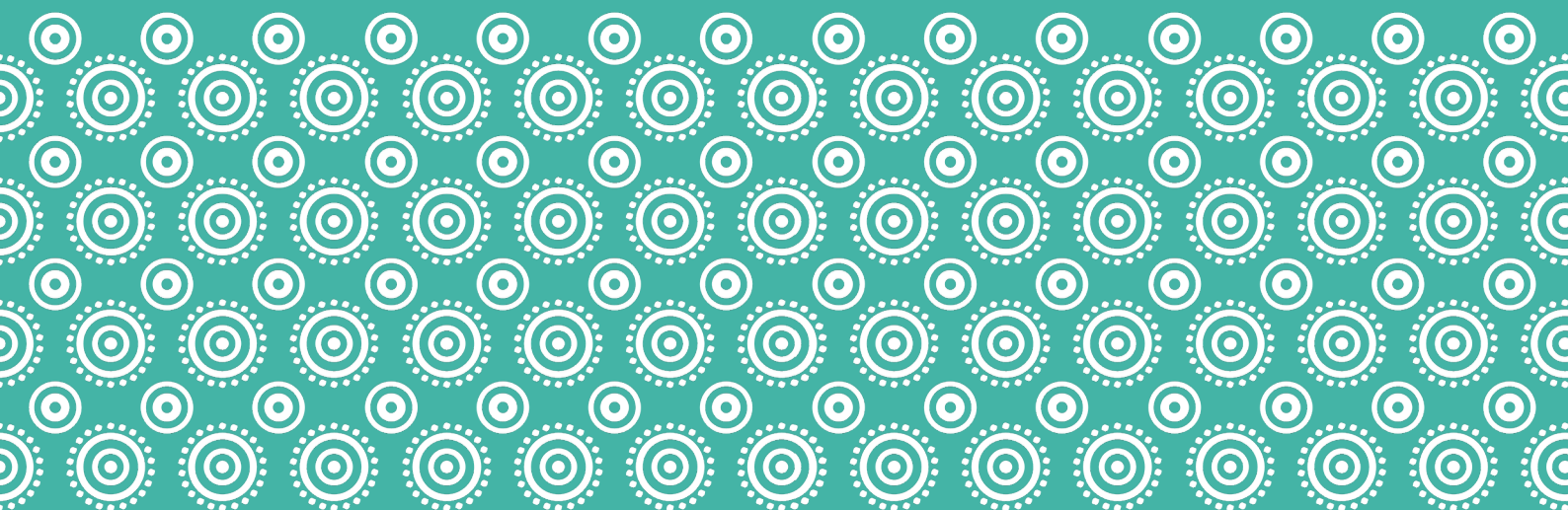


HOW TO:

Do a group sale on the Simply advisor portal

- With spreadsheet entry

SMART. SIMPLE. SAFE.



Log in to the advisor portal on www.advisor.simply.co.za/login and select "start new sale", select the 'Group Cover' option and fill in the required information

Start a new sale

Choose the type of cover

☐ Domestic Cover

☐ Family Cover

☐ Third Party Family Cover

☐ Flexi Funeral Cover

☒ Group Cover

Are you authorised to act on behalf of the organisation?

☒ Yes

☐ No

Company name

JC plumbers

First name of primary contact

Steph

Last name of primary contact

Jones

Cellphone (WhatsApp number)

0828141872

So we can communicate with you on WhatsApp

Email

steph@simply.co.za

So we can email you your policy documents

[Continue](#)

[or go back to my dashboard](#)



Choose which employees will be covered on the policy, and select either a quick cost estimate or a full quote

To qualify for cover, employees must be:

- 18 to 64 years old.
- Permanently employed or on 6+ month contract.
- Legally employed & actively working 20+ hours a week in SA.

Who are you planning to cover?

☒ All your employees, or all your employees in a defined group (e.g. call centre agents, field workers).

☐ Only those employees who want the cover and will pay for it, or those you want to include and pay for (min 5 employees)

What type of quote would you prefer?

☐ Quick cost estimate - requires limited info and gives an estimated cost in seconds.

☒ Full quote - requires the name, gender, monthly salary and date of birth of each employee and allows you to buy online if you'd like to.

[Get started](#)

Fill in the required company information

Are all the employees you plan to cover permanently employed or on 6+ month contracts, legally employed in SA and working at least 20+ hours per week in SA?

☒ Yes
☐ No

Are all the employees you plan to cover currently actively at work? I.e. they are attending to their normal work duties

☒ Yes
☐ No

In which province are most of the employees based?

Western Cape

Which industry is your organisation primarily in?

General Services

Which industry in General Services do you work in?

Artisans, Plumbing, Electricians, Maintenance

Is this policy replacing an existing policy or a very recently cancelled policy?

☐ Yes
☒ No







Referral code (if applicable)

Optional

Apply

Next

There are multiple ways to upload employee data. In this example, we're using the spreadsheet

 <p>Enter manually</p> <p>You will need their name, monthly income and date of birth.</p> <p>Add</p>	 <p>Spreadsheet upload</p> <p>Use our spreadsheet wizard to upload your employees</p> <p>Upload</p>
 <p>Use PaySpace to upload your employees</p> <p>Connect</p>	 <p>Use SimplePay to upload your employees</p> <p>Connect</p>
 <p>Upload your employees with Sage 300</p> <p>Connect</p>	 <p>Upload your employees with LabourNet</p> <p>Connect</p>

Download the template, fill in the employee information on the spreadsheet and then click “upload”

A few things to note when completing the spreadsheet:

- No special characters or extra spaces
- Date formatting should be DD/MM/YYYY
- Confirm that the ID number and birth date are ok
- Make sure number formatting is being used for gross income
- Confirm the passport is not expired
- Cell number should be a South African number (the zero is not necessary)

Upload your employees using a spreadsheet

Speak to us about integrating your payroll system directly

45%

Please confirm your employee details and proceed

You have a total of 5 employees.

Name	Gender	Income	Date of birth	
Betty	Female	15000	01/09/1976	<button>Remove</button>
Lilly	Male	10000	24/07/1973	<button>Remove</button>
Minnie	Male	25500	24/07/1960	<button>Remove</button>
John	Male	85000	24/07/1960	<button>Remove</button>
Shawn	Male	8500	08/10/1974	<button>Remove</button>

Next

Here you can select the benefits and adjust the cover amounts. You can also choose between multiple of salary or equal amounts for employees

Multiple of salary

Equal amount

For an average of **R1,182** per employee p/m, each one would get:

Life cover - 2x annual salary (max R2.5M)

0.5x annual salary5x annual salary

1.93% of salary up to a max of R2,010 per employee p/m*
5 employees will be asked medical questions to check if they qualify for full cover.

Occupational disability cover - 3x annual salary (max R2.5M)

0.5x annual salary5x annual salary

2.28% of salary up to a max of R1,583 per employee p/m*
5 employees will be asked medical questions to check if they qualify for full cover.
1 employee has reached the max cover limit of R2.5M

Family funeral cover - R20,000

R5,000R100,000

R40.70 per member

Single Life funeral cover not selected

Cover summary

Life	R2,779 p/m
Occupational disability	R2,928 p/m
Family funeral	R204 p/m
Total monthly premium	R5,911 p/m

5 employees - average premium per employee R1,182 p/m

Cost per member details

Life	1.93% of salary up to a max of R2,010 per employee p/m*
Occupational disability	2.28% of salary up to a max of R1,583 per employee p/m*
Family funeral	R40.70 per member

* The premium is capped at this value for employees who have reached the R2.5m max cover limit.

Important policy features

There is a 6 (six) month waiting period on disability claims, during which only claims from accidental causes will be paid. Life and funeral claims resulting from both natural and accidental causes will be paid from day 1.

Show employee cover details

Download quote

Next

Complete the company details. By clicking “fetch details” company info will be pulled through using Experian



Fetch details

First name

Stephanie

Surname

Jones

Date of birth (dd/mm/yyyy)

13/08/1987

Cellphone

0828141872

Landline

(optional)

What is your nationality?

South Africa

Home Address

Ascot Mews, Royal Ascot

Royal Ascot Lane, Sandown, Sandton, South Africa

powered by Google

Email address for policy document and logging in

Please note sensitive employee info will be sent to this address

stephi.wulf@gmail.com

Email address for monthly invoice

stephi.wulf@gmail.com

What kind of business is this?

Private Company [Pty Ltd]

Country of Incorporation/Registration

☒ South Africa

☐ Other

Registered name

JC plumbing

Trading name

JC plumbing

Registration no

2011/132479/07

Registered Address

Ascot Mews, Royal Ascot

Physical Address

Provide Head Office address if there are multiple addresses

0B Grand National Boulevard, Milnerton Ridge, Cape Town, South Africa

Source of Funds

☒ Company profits

☐ Investment returns

☐ Donations

☐ Government

Company Tax Number

9424094176

Company VAT Number (if applicable)

4240261992

Fill in the payment details and click “next”

Payment details

By clicking Next below, you authorise **The Hollard Life Assurance Company Ltd (Hollard)** to deduct the monthly premium of **R5,911** from **JC plumbing's** bank account (details below), on condition the amount deducted never exceeds the amount committed to under this policy. This mandate will commence on the debit order date selected below and will continue monthly thereafter until it is terminated by giving not less than one month's notice. The reference number for the deduction will contain the word **SIMPLYSURE**.

You also agree that cancelling this debit order authority will not cancel the agreement you have with **SIMPLYSURE**.

Bank

Capitec Bank

Bank account number

1234567890

Bank account type

☒ Cheque

☐ Current

☐ Savings

☐ Transmission

Which day of the month should we debit the bank account?

25

Download quote

Next

or go back

Read and accept the T&Cs, then request OTP

Read the full Ts&Cs

☒ You consent to Simply offering exclusive individual benefits to my employees

By checking this box and providing the OTP below, you accept all terms and

☒ conditions and confirm you have read and understood the information and disclosures provided relating to this product

Just a moment please

Request OTP

Congratulations, your sale is complete

Congrats, your employees are now covered

Please see policy details and next steps below

Cover summary

Life	2X annual salary* (max R2.5M)
Occupational disability	3X annual salary* (max R2.5M)
Family funeral	R20,000

* Approximate – as per your schedule

Cost per member details

Life	1.93% of salary up to a max of R2,010 per employee p/m*
Occupational disability	2.28% of salary up to a max of R1,583 per employee p/m*
Family funeral	R40.70 per member

* The premium is capped at this value for employees who have reached the R2.5m max cover limit.

Policy details

Your total premium is R5,911 p/m. When your first debit order occurs you will see the shortcode SIMPLYSURE on your bank statement. Your invoice will be sent shortly.

Your policy number is JCPLUMBING26260. You should use it when communicating with us.

Your policy documents should be emailed to you within two working days.

Employee assistance benefit

Hollard has contracted with Reality Wellness, an authorised employee psychosocial and wellness programme provider, to offer psycho-social support to employees who are covered under the Simply Staff Cover product. Please follow this [link](#) to view the programme guide.

What happens next?

Your employees have been sent an SMS with a link that allows them to enter the details of their beneficiaries and the family members covered by their funeral plan (if applicable). Please let your employees know you've taken the policy and encourage them to give us the information we need. If they don't, there may be complications if there's a claim.

Your employees get their first R0 of cover without having to answer any health questions. Employees who get more than this will have to answer a few simple health questions before they get full cover for the amount above R0. Until then, they get accidental only cover for that portion.

The employees who need to answer health questions are: Betty Dube, Lilly Smith, Minnie Mouse, John Stevens, Shawn Smith.

The following employees have reached our cover limit of R2.5m, so their cover will be less than the selected multiple of salary (they are eligible for up to R2.5m in additional cover through our retail product – we will contact them to see if they would be interested):
John Stevens

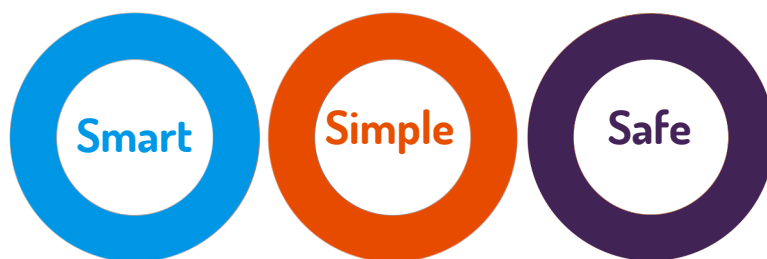
Questions?

For your convenience, we've put together a list of the FAQs we get from both employers and employees:

- [Employer FAQs](#)
- [Employee FAQs](#)

We'd encourage you to review the Employer FAQs – they cover important issues like the impact of the policy on employee tax (PAYE) and how to add and remove employees. We'd also encourage you to distribute the employee FAQs to your employees.

Please contact us on 021 045 1513 if you have any questions that aren't covered by the FAQs.



Thank you!

Contact your broker consultant if you have any queries or need assistance.



Simply Financial Services (Pty) Ltd is a registered financial services provider (FSP 47146). T&Cs online.



Hollard Life Assurance Company Limited (Reg No. 1993/001405/06), a Licensed Life Insurer and an authorised Financial Services Provider