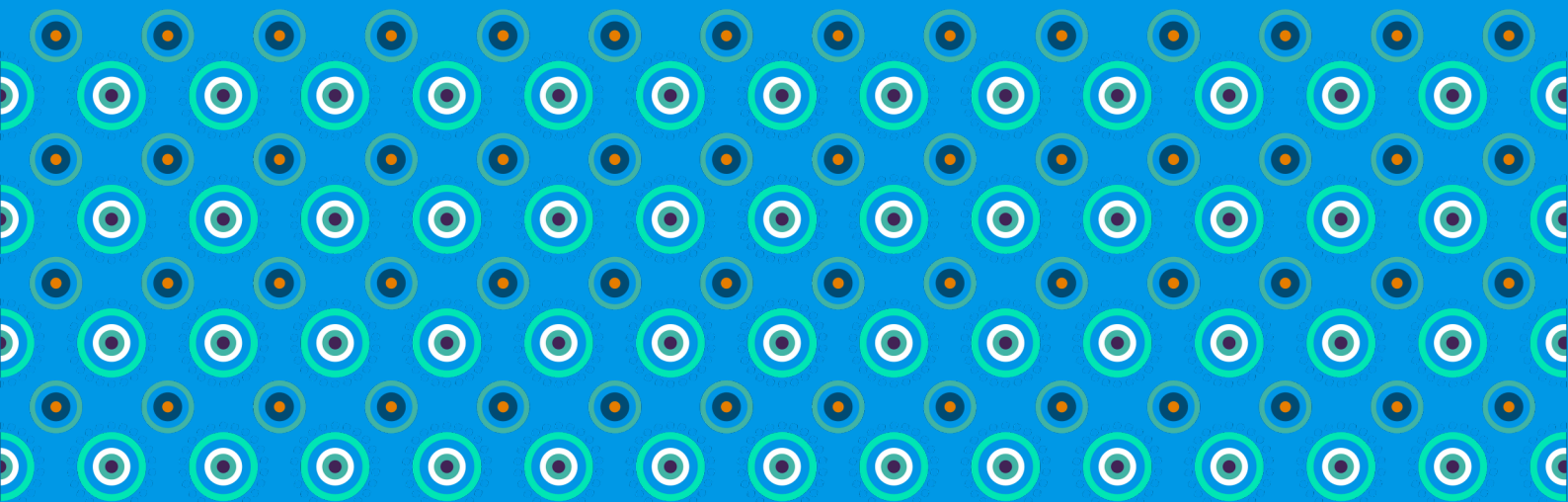


HOW TO Sell funeral cover to foreign nationals legally residing in SA

SMART. SIMPLE. SAFE.



Log in to the advisor portal advisor.simply.co.za/login and start a new sale

Home / Dashboard

Start new sale

Search

Cover type

Sale status

Compliance status

-- None --

-- None --

-- None --

Sales

View Sales

Compliance Documents

Policies

Fill in all the required information

Family Cover Sale

Quote for Tammy Smith (0828141872)

Age in years:

26

Gender?

Female

Male

Smoker?

No

Yes

Married?

Yes

No

Monthly income (in rands) before tax?

20000

Highest level of education?

3 year degree

no matric

matric


3 year diploma

4 year+ degree

Continue

or go back to my dashboard

Select “no” for valid SA ID number, then select “yes” if they are legally residing in SA



Start a new sale

Choose the type of cover

☒ Family Cover
☐ Third Party Family Cover

Do you have a valid South African ID number?

☐ Yes
☒ No

Are you legally residing in South Africa?

☒ Yes
☐ No

First name

Tammy

Last name

Smith

Cellphone number

0828141872

Email address

(optional)

[Continue](#)

[or go back to my dashboard](#)

You will be provided with a quote for funeral cover. Additional family members can be added for funeral cover at an additional cost per person (foreign nationals must be legally residing in SA). Cashback is optional

Here's your quote. Most people take the combo, but you can adjust as you like.

For R67.00pm you get:

Funeral R50,000 cover

Min: R15,000 Max: R100,000

Pays out in 48 hours if the insured person dies, to pay for funeral expenses. This ONLY covers the main insured life. If you wish to cover other family members, please add them below.

Premium: R67.00pm

☐ Add Family Members

Add other family members to your funeral cover. They must be under 75, except for parents and grandparents, who must be under 80. They must have a valid SA ID number, or also legally reside in South Africa. If there is a claim, we'll verify their residence and their relationship to you.

☐ Add cashback benefit

For R29.00 extra pm, you will receive 50% of your total premium back every 5 years. So, in the first 5 years you'll pay an extra R1,740.00 and get R3,516.54 back.

Total Monthly Cost R67.00pm

Fill in the rest of the required information

Congrats! You qualify for the full cover option. Please enter your details below to proceed.

Passport number
ABA9875413

Passport expiry date
15/08/2027

Date of birth
11/04/1998

What is your nationality?
New Zealand

First name
Tammy

Last name
Smith

Cellphone
0828141872

Additional contact number

Email
tammy@gmail.com

Address
Grosvenor Street, Hatfield, Pretoria, South Africa

Provide the beneficiary details

Next, please provide the details of your loved ones in case there's a claim.

Beneficiary Details

Funeral

Please choose the person to be paid the funeral benefit if you die. You'd be paid if any other covered persons die.

Add beneficiaries

Name
Tom

Surname
Smith

Date of Birth
13/08/2005

ID/Passport Number

Relationship
☐ Child
☐ Spouse
☒ Other

Add

By using our website, you agree to our [Cookie Policy](#)

Accept

Read and accept the T&Cs

70% complete

Before you check out, here are the most important T&C's for you to be aware of.

(It's important that you also read the full T&Cs, which you can access below, and which we'll send you once you've completed the sign-up process.)

Replacement Policies

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

☐ Yes

☒ No

Premiums

Your premiums will increase by 10% on every policy anniversary, and your cover will increase by 5% on every policy anniversary. Your premiums are guaranteed for the first year, thereafter we may revise them with 31 days' notice.

Term

The cover will begin as soon as your policy has been issued. This will be immediately on completion of the application process, unless you have asked for the policy to start in the future. Your policy will automatically renew each year and continue for as long as you continue to pay premiums.

Grace Period

If you fail to pay a premium, your cover will remain in place for 30 days after the first failure. After that it will also be paused until we receive a payment.

Claims

The insured person and their family (as applicable) will only be covered for claims resulting from accidental causes until the policy has been in force for at least 6 months and you have paid 6 monthly premiums ("the Waiting Period"). If the main insured life dies of natural causes during the Waiting Period, all the premiums paid will be refunded.

If family members covered under the funeral cover die of natural causes during the Waiting Period, the funeral benefit will not be paid, and the premium payable for that family member's cover will not be refunded. After the waiting period, everyone listed on the funeral benefit will be covered for all causes.

Benefits can only be paid into a South African bank account.

No benefit can be paid if the death or injury results from the specific behaviours or events listed [here](#)

Non-Disclosure

If you have given false information in your application, your claim may not be paid. If you have taken out life or disability cover and the insured life has failed to disclose an existing health issue, your claim may not be paid.

Employment

The insured life must be employed and earning an income to be able to take out life and disability cover.

Advice

You have chosen these benefits yourself and have not received any advice from Simply Financial Services regarding the application for this policy.

Personal Information

By accepting the terms and conditions, you consent to Simply receiving and storing your personal information. We will keep this data secure and confidential and will only share it with third parties to manage your policy better or if required to do so by law.

Debit order

Where your bank permits it, Simply will attempt to set up a Debicheck collection. Debicheck is a new type of debit order that requires you to confirm your debit order with your bank when entering into a new contract. If we do not get any response from your bank, we will still attempt to collect the premium through the Debicheck system. We will deduct your premium on the debit order date you've selected, but may attempt to do so on another day if we are unsuccessful – or unable to attempt a deduction – on your chosen date.

If your bank does not permit Debicheck, or you explicitly decline our request for a Debicheck mandate, we will attempt to collect the premium owed via a standard debit order.

To see Simply's full T&Cs click [here](#).

☒ I accept Simply's full T&Cs and confirm I've read and understood all information and disclosures provided in relation to this product

[Go to checkout](#)

[or go back](#)

Complete the payment details section. Enter the OTP and click “finish”

Finally, please provide your payment and compliance info to complete your purchase

Payment Options

Debit order

By clicking Finish below, you authorise Hollard to deduct the monthly premium of R619 from your primary bank account detailed 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 SIMPLY.

If your bank allows Debicheck, you will be receiving a request from them to authorise this collection. Declining this request does not cancel the debit order mandate you are authorising here. Simply is still authorised to collect this premium via a standard debit order.

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

When would you like your cover to start

☒ Immediately

☐ 1 November

☐ 1 December

Debit day (pay date)

Select debit day

Bank (where your salary is paid)

Select bank

Account type

☐ Cheque

☒ Savings

☐ Transmission

Account number

Validate OTP to complete process:

Please click [here](#) to send a summary of the application and an OTP to 0828141872. This OTP must be provided by the premium payer once they have reviewed the message and input here.

Validate

Enter OTP

Please click [here](#) to send a summary of the application and an OTP to 0838141872. This OTP must be provided by the insured life once they have reviewed the message and input here.

Validate

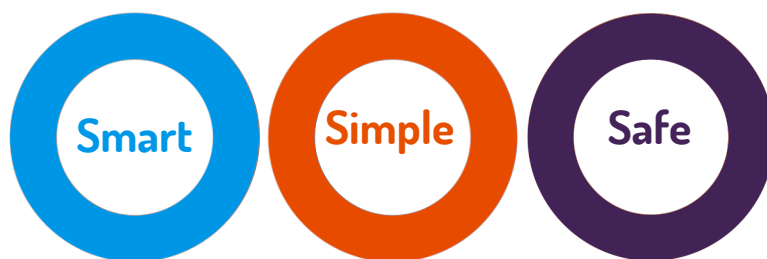
Go for it. We'll pay back any premiums you've paid if you cancel in the next 30 days.

Please answer all questions above

Finish

[or go back](#)





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.



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