

Implementation process for Sanlam Umbrella Fund In-Fund members (paid-up or phased retiree)

1. Members who wish to preserve their money in the Sanlam Umbrella Fund must complete the following documentation:
 - ② The SUF Withdrawal and Retirement benefit claim [form](#)
 - ② The In-fund member instruction [form](#).
2. Completed documentation should be returned to Sanlam Umbrella Fund Administration via email to: SanlamEB@sanlam.co.za.
3. Members may choose to appoint their own financial adviser. The appointment may be done at the time the member takes-up the in-fund option and completes the In-Fund member instruction [form](#) or the member may appoint an adviser at any time by completing the necessary [form](#).
4. The financial advisor will be given automatic access to view the member's details on the Sanlam Portal.
5. If members qualify for this, members who wish to make application to select their own investment portfolios or who wish to change the portfolios already selected, must complete and submit the appropriate investment selection [form](#). Members may choose to change their investment portfolios at any stage.