



MANUAL

Prepared in terms of section 51 of the
Promotion of Access to Information Act 2 of 2000
for assistance in obtaining access to information from:

- **Sanlam Life Insurance Limited ("Sanlam Life")**
- **Sanlam Limited**
- **Sanlam Trust Limited**
- **Sanlam Collective Investments Ltd**
- **Sanlam Endowment Options (Pty) Limited**
- **Sanlam Linked Investments (Pty) Ltd**
- **Sanlam Personal Loans (Pty) Ltd**
- **Real Futures (Pty) Ltd**
- **Echelon Distribution Services (Pty) Ltd**
- **SFP Advisory Services (Pty) Ltd**
- **Sanlam Healthcare Distribution Service (Pty) Ltd**
- **Sanlam Healthcare Management (Pty) Ltd**
- **Completemed**

CATEGORIES OF RECORDS AND SUBJECTS ON WHICH RECORDS ARE HELD

<i>Products and Services subjects –</i>	
▪ Long-term insurance products	▪ Retirement annuities, Pension Funds
▪ Savings products	▪ Trust services
▪ Unit trust products	▪ Money transfer services
▪ Investment and risk products to groups and schemes	▪ Actuarial and consulting services to the group retirement industry
▪ All records kept in terms of legislation applicable to any of the above products or services and the Financial Services Industry in general	▪ Reward programme benefits, services and Reality Point balances
<i>Company Records subjects –</i>	
▪ Finance	▪ Distribution
▪ Actuarial	▪ Marketing
▪ Client care	▪ Information technology
▪ Product management	▪ Human resources
▪ All records kept in terms of the Company Laws of South Africa	
<i>Subjects on whom records are held –</i>	
▪ Shareholders	▪ Subsidiary companies
▪ Policyholders	▪ Advisers
▪ Directors	▪ Brokers
▪ Employees	▪ Clients
▪ Officials	▪ Banking institutions
▪ Consultants	▪ External companies / contractors
▪ Investors	▪ Third Parties
▪ Auditors	▪ Associate Companies
<i>Which records are held in respect of the above-mentioned subjects?</i>	
▪ Confidential	▪ Scientific
▪ Personal	▪ Research
▪ Commercial	▪ Operational
▪ Financial	▪ Trade
▪ Group/company incorporation	▪ Business
▪ Group/company financial	▪ Internal group/company divisions
▪ Group/company departments	▪ Group/company structure
▪ Strategy	▪ Operational
▪ Contractor	▪ Policyholder
▪ Medical	▪ Shareholder
▪ Subsidiary companies	▪ External companies
▪ Adviser	▪ Broker
▪ Consultant	▪ Directors
▪ Information technology	▪ Employee
▪ Client	▪ Banking institutions
▪ Product and services	▪ Official/legal
▪ Contracts	▪ Policy documents
▪ Rules of Funds	▪ Board of Trustees decisions
▪ Statutory required reports	

RECORDS HELD IN TERMS OF THE FOLLOWING LEGISLATION

▪ Long-term Insurance Act, 52 of 1998	▪ Employment Equity Act, 55 of 1998
▪ Pension Funds Act, 24 of 1956	▪ Collective Investment Schemes Control Act 45 of 2002
▪ Policyholder Protection Rules	▪ Financial Intelligence Centre Act, 38 of 2001
▪ Promotion of Access to Information Act 2 of 2000	▪ Prevention of Organised Crime Act 121 of 1998
▪ Inspection of Financial Institutions Act, 80 of 1998	▪ Electronic Communications and Transaction Act 25 of 2002
▪ Financial Advisory and Intermediary Services Act 37 of 2002	▪ Income Tax Act, 58 of 1962
▪ Labour Relations Act, 66 of 1995	▪ Value-Added Tax Act, 89 of 1991
▪ Basic Conditions of Employment Act, 75 of 1997	▪ Unemployment Insurance Act, 30 of 1966
▪ Companies Act, 61 of 1973 ▪ Companies Act 71 of 2008	▪ Protection of Constitutional Democracy Against Terrorist and Related Activity 33 of 2004
▪ Consumer Affairs (Unfair Business Practices Act), 71 of 1988	▪ Trade Marks Act, 194 of 1993
▪ Compensation of Occupational Injuries and Diseases Act, 130 of 1993	▪ Pension Fund Regulations
▪ Administration of Estates Act, 66 of 1965	▪ Participation Bonds Act, 55 of 1981
▪ Trust Property Control Act, 57 of 1988	▪ National Payment System Act, 78 of 1998
▪ Usury Act, 73 of 1965	▪ Financial Institutions (Protection of Funds) Act, 28 of 2001
▪ Prevention and Combating of Corrupt Activities Act 12 of 2004	▪ National Credit Act, 34 of 2005
▪ Consumer Protection Act 68 of 2008	▪ Regulation of Interception of Communications and Provision of Communications-related Information Act 70 of 2002
▪ Skills Development Levies Act 9 of 1999	

HAS A NOTICE STATING WHICH RECORDS CAN BE OBTAINED VOLUNTARY AND AUTOMATICALLY WITHOUT A PERSON HAVING TO MAKE A REQUEST AS PROVIDED FOR IN SECTION 52(2) OF THE ACT?

No notice in terms of Section 52(2) of the Act has been published. Certain records are however freely available on Sanlam's website www.sanlam.co.za

WHAT PROCEDURE IS PRESCRIBED BY THE ACT IF YOU WISH TO OBTAIN INFORMATION?

- Complete the necessary application form. (If you need help on where to obtain the application form or you need help on any other matter, contact Anne-Marie van Dyk at (021) 947-2507*)
- Send the completed application form to the address below and mark it for the attention of the relevant Company Official mentioned below
- The Company Official will then process your application and inform you of the fees (if any) you have to pay and the different procedures that must be followed until your application is finalized*
- Note: Access to certain records may be denied on the grounds set out in the Promotion of Access to Information Act, No 2 of 2000*

* The forms and fees payable are available on our website www.sanlam.co.za.

Address 2 Strand Street, Bellville, 7530
P O Box 1, Sanlamhof, Bellville, 7532

Company Officials

Sanlam Life – Louis Venter

E-mail louis.venter@sanlam.co.za
Tel (021) 947-3522
Fax (021) 947-2653

Sanlam Trust Limited – Berrie Botha

E-mail berrie.botha@sanlam.co.za
Tel (021) 947-4062
Fax (021) 947-1496

SFP advisory Services (Pty) Ltd – Emil Scheepers

E-mail emil.scheepers@sanlam.co.za
Tel (021) 947-2449
Fax (021) 947-6500

Sanlam Endowment Options (Pty) Ltd – Danie Claassen

E-mail danie.claassen@sanlam.co.za
Tel (021) 947-4810
Fax (021) 947-2102

Sanlam Limited – Sana-ullah Bray

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Tel (021) 947-1067
Fax (021) 947-3670

Sanlam Collective Investments Ltd – San-Marie Greeff

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Tel (021) 950-2648
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Sanlam Linked Investments (Pty) Ltd – Egbert Fouche

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Tel (021) 947-5460
Fax (021) 947-9636

Sanlam Personal Loans (Pty) Ltd – Cobus Conradie

E-mail cobus.conradie1@sanlam.co.za
Tel (021) 947-2211
Fax (021) 947-4326

Real Futures (Pty) Ltd – Andre van Selm

E-mail andre.vanselm@sanlam.co.za
Tel (021) 947-3634
Fax (021) 957 1302

Echelon Distribution Services (Pty) Ltd – Emil Scheepers

E-mail emil.scheepers@sanlam.co.za
Tel (021) 947-2449
Fax (021) 947-6500

Sanlam Healthcare Distribution Services – Piet van der Walt

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Tel (021) 947-2643
Fax (021) 947 5864

Completemed – Sharon Rubens

E-mail sharon.rubens@sanlam.co.za
Tel (021) 947-5849
Fax (021) 947 5864

THE SOUTH AFRICAN HUMAN RIGHTS COMMISSION GUIDE

The Human Rights Commission has compiled a guide to help people who wish to exercise any rights granted by the Act. If you need any help, you can contact the Human Rights Commission at the following address:

Private Bag 2700, HOUGHTON, 2041

Tel (+27 11) 484 8300

Fax (+27 11) 484-0582

Web www.sahrc.org.za

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