



Sanlam Secure Services: Registration of proxy

Complete this form to nominate a person to act on your behalf on Secure Services. The person granting the privilege is the owner of the product and is referred to as the proxy giver. The person receiving the authority is referred to as the proxy holder.

This facility is not for registering an intermediary to work on your behalf. Intermediaries should use the appropriate tools at their disposal for registration.

After completion, please submit this form together with any supporting documents to the Sanlam Life Client Contact Centre via:

- E-mail life@sanlam.co.za

This authority only applies to Secure Services and does not extend to other service channels.

Authorisation and supporting documents

This form must be signed by the proxy giver and the proxy holder.

We require the following supporting documents

For the proxy giver:

- copy of ID document.
- copy of utility bill in the name of the proxy giver with the residential address displayed, (preferably a cellphone account,) not older than 3 months,

For the proxy holder:

- copy of ID document
- copy of utility bill in the name of the proxy holder with the residential address displayed, (preferably a cellphone account), not older than 3 months.

Details of proxy giver (the product owner)

Name and Surname _____

ID/ passport number _____ Country of issue _____

Email address _____ Cellphone number _____

Residential address _____

[Insurance](#)

[Financial Planning](#)

[Retirement](#)

[Investments](#)

[Wealth](#)

Details of proxy holder

Name and Surname _____

ID/ passport number _____ Country of issue _____

Email address _____ Cellphone number _____

Residential address _____

Signature of proxy holder _____

Privileges for the proxy holder at each Sanlam business

Please provide at least one product number per business. Although only one product number is provided, the proxy holder will be able to access all products for that business.

Sanlam Private Wealth product number _____

Privileges

Level 1: View

Glacier product number _____

Privileges (please select one)

Level 1: View

Level 2: Includes level 1 PLUS switch/ rebalance funds

Level 3: Includes level 2 PLUS sell units

Sanlam Collective Investments product number _____

Privileges (please select one)

Level 1: View

Level 2: Includes level 1 PLUS transact

Satrix product number _____

Privileges (please select one)

Level 1: View

Level 2: Includes level 1 PLUS transact

BIFM Unit Trusts product number _____

Privileges (please select one)

Level 1: View

Level 2: Includes level 1 PLUS transact

Sanlam Individual Life product number _____

Privileges

Level 1: View

Sanlam SKY product number _____

Privileges

Level 1: View

Granting of authority

I confirm that I am the owner of the product(s) indicated in this form.

I approve the privileges requested in this form.

I indemnify Sanlam and/or any of its subsidiaries against any claims as a result of granting this authority.

Signature of proxy giver

Signed at _____ on _____ date (dd/mm/ccyy)