

## GENERATIONAL WEALTH

# Powered by 1Life Vantage

You are in the business of creating generational wealth. Let us help you optimise your financial planning process with life and investment options, accelerated through one of the first comprehensive financial adviser digital solutions in South Africa, 1Life Vantage.



**1Life**

Changing Lives

# Global insurance expertise

1Life is part of the broader financial services holding company, BHL, which is represented globally.

BHL over  
**11 million**  
policy holders

**08**  
countries

**11**  
short-term insurers

**02**  
life insurers

**05**  
price comparison sites



# 1Life is known for innovation



First to use convenient **HIV saliva testing.**



First to sell cover online.



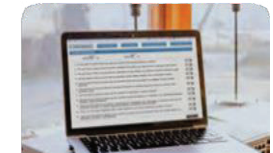
First to sell on mobile and **USSD policy servicing.**



Remote acceptance of policies via electronic signature and two-factor verification through a one-time pin.



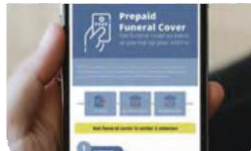
Brand that **gives back** to communities – online education and content.



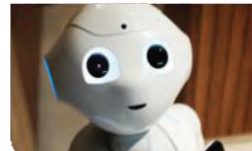
Limited underwriting **6 Question process** and top-up cover.



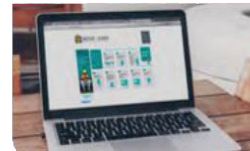
**WhatsApp** technology – claims documentation process.



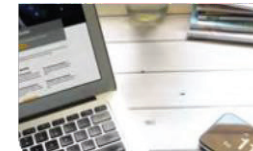
Prepaid and subscription funeral (franchise opportunity).



Robotic Process Automation (RPA) of funeral claims.



1Life Referral App.



**1Life Vantage**, a revolutionary digital solution for IFA's, with Wealthport LISP incorporated.



A South African first **Covid-19 screening app**, available on 1Life Pulse.

## Our awards



Swiss-Re



SACSI



Ask Afrika



City Press



PWC

2021 SOUTH AFRICAN  
**BCX**  
DIGITAL  
INNOVATION  
AWARDS



# 1Life

Changing Lives

# 1Life Vantage

## FULLY INTEGRATED DIGITAL SOLUTION THAT USES



### 1Life Plan (FNA)

to ensure **rapid processing** and **appropriate product selection**.

## REAL-TIME UNDERWRITING ACCEPTS

**97%**  
of policies



within **35 min**

## PAPERLESS, SECURE, REMOTE BUSINESS CONCLUSION THROUGH



Electronic signature



Two-factor verification



One-time pin

## ADDITIONAL FEATURES

1. CRM
2. One integrated view of client
3. Limited and comprehensive underwriting
4. ROA built into policy schedule
5. Regulated commission
6. As and when commission
7. Available on all smart devices

## 4 UNIQUE COMMISSION MODELS



### Daily commission payments

with premium commission model protects you against **commission risk**.

## CLOUD COMPLIANCE



Client **interactions** and **advice** backed up via the **cloud**.

## NO NEED FOR FULL MEDICALS

Underwrite fully on **life, dread disease and disability cover** with **no medicals**, only limited medical questions and HIV test, **simplified** through a saliva test.



## PAPERLESS SELF-SERVICE



Removes administration overhead by allowing **clients to self-service** and alerting you when this is done in real time.

## BROKER SUPPORT



Full specialist support through our financial adviser consultants.

## STRAIGHT-THROUGH PROCESSING

Seamless delivery on products.



Incorporating a fully **integrated LISP**, optimised for the modern financial adviser and powered by Wealthport.



**TECHNOLOGY ENABLED ONLINE WILL DRAFTING SERVICE** available to all of our clients and prospective clients.

# 1Life

Changing Lives

# 1Life Vantage and incorporated Wealthport LISP



**WORLD CLASS TECHNOLOGY**



**EASY TO USE & CONVENIENT, WITH INTUITIVE NAVIGATION**



**SINGLE ACCESS TO ALL 1LIFE INVESTMENT PRODUCTS**



**DASHBOARD OVERVIEW**



**LIVE ASSET ALLOCATIONS DURING QUOTING**



**FULL CLIENT HOLDINGS MARKET VALUE REPORTS**



**OFFSHORE AND LOCAL REPORTING**



**SHORTCUTS ENABLES YOU TO VIEW CLIENT PORTFOLIO'S FROM ANYWHERE IN THE SYSTEM**



**AUTO-SAVING SO YOU PICK-UP WHERE YOU LEFT OFF**



**SINGLE LOG-IN FOR ZAR OR USD**



**PLANNING TOOLS, WITH INTEGRATED REG 28 CALCULATOR**



**ABILITY TO ADD COVER LETTER/ADVICE NOTES ON QUOTES WITH FREE TEXT FIELDS**

## Client



**DASHBOARD OVERVIEW**



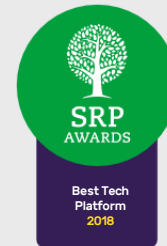
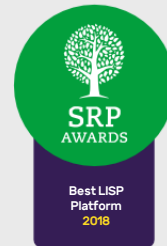
**SUMMARY/DETAILED INVESTMENT STATEMENTS**



**HISTORICAL (ANNUAL) TAX CERTIFICATES**



**PROVISIONAL TAX CERTIFICATES**



# 1Life product offering

## 1Life Risk Products



Pure Life Cover



Dread Disease



Disability Cover



Expense Protector



Pure Life Limited Underwriting



All Woman



Pulse



Pure Life Plus



1Life Will and Estate Plan

## 1Life Investment Products



1Life Tax Free Savings Investment



Retirement Annuity Investment



1Life Guaranteed Future Value



1Life Living Annuity



1Life Fixed Return and Global Growth Protector


Independent Investing powered by

**WEALTHPORT**

1Life is a Licensed Life Insurer and Financial Services Provider. Ts & Cs online.  
Administered by Wealthport, a Licensed Administrative FSP and Retirement Fund Administrator.

# Application forms

## Broker application form



### BROKER APPLICATION FORM

Wealthport (Pty) Ltd (2012/025870/07)  
 Wealthport (Pty) Ltd (Wealthport) is an Authorised Financial Services Provider (PSP No. 44338).  
 Bank A, Capital Park, Spring Bank, Bryanston, Durban, 2019 • Postal address: Postnet Suite 411, Private Bag 451, Bryanston, 2021  
 Contact number: 011 593 5129 • Facsimile: 087 231 8972 • Email: [advice@wealthport.co.za](mailto:advice@wealthport.co.za)

Important information:   
 Please read the latest Terms and Conditions applicable to this application. This is available from the Client Services Centre at 020 593 1033 or at [www.wealthport.co.za](http://www.wealthport.co.za)  
 Please submit applications for processing to [advice@wealthport.co.za](mailto:advice@wealthport.co.za) or fax to 087 231 8972.

We supply FICA documents as per the Wealthport FICA requirements list.

Please supply FICA documents as per the Wealthport FICA requirements list.

Name of FSP: \_\_\_\_\_  
 FSP (option number): \_\_\_\_\_  
 Licensed as:  Category 1 FSP  Category 2 FSP  
 Type of entity:  Company  CC  Sole Proprietor  Partnership  
 Listed on:  Listed  Unlisted  
 Registrars name: \_\_\_\_\_  
 Trading name: \_\_\_\_\_  
 Tax number: \_\_\_\_\_  
 VAT registered:  Yes  No VAT number: \_\_\_\_\_

Physical address:  
 Unit number: \_\_\_\_\_ Complex name: \_\_\_\_\_  
 Street name: \_\_\_\_\_ Street / Farm name: \_\_\_\_\_  
 Suburb / District: \_\_\_\_\_ Postal code: \_\_\_\_\_  
 City / Town: \_\_\_\_\_  
 Postal address: Same as above? Please tick this box,


Postal code: \_\_\_\_\_

Authorised individual details:  
 Title: \_\_\_\_\_  
 First name: \_\_\_\_\_  
 Surname: \_\_\_\_\_  
 ID number: \_\_\_\_\_  
 Email address: \_\_\_\_\_  
 Cell phone number: \_\_\_\_\_  
 Other contact number: \_\_\_\_\_

Wealthport (Pty) Ltd, Registrars on number 2012/025870/07 Version\_May22 1 of 4 items

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## FSP application form



### Financial Services Provider Application

Wealthport (Pty) Ltd (2012/025870/07)  
 Wealthport (Pty) Ltd (Wealthport) is an Authorised Financial Services Provider (PSP No. 44338).  
 Bank A, Capital Park, Spring Bank, Bryanston, Durban, 2019 • Postal address: Postnet Suite 411, Private Bag 451, Bryanston, 2021  
 Contact number: 011 593 5129 • Facsimile: 087 231 8972 • Email: [advice@wealthport.co.za](mailto:advice@wealthport.co.za)

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 Listed on:  Listed  Unlisted  
 Registrars name: \_\_\_\_\_  
 Trading name: \_\_\_\_\_  
 Tax number: \_\_\_\_\_  
 VAT registered:  Yes  No VAT number: \_\_\_\_\_

Physical address:  
 Unit number: \_\_\_\_\_ Complex name: \_\_\_\_\_  
 Street name: \_\_\_\_\_ Street / Farm name: \_\_\_\_\_  
 Suburb / District: \_\_\_\_\_ Postal code: \_\_\_\_\_  
 City / Town: \_\_\_\_\_  
 Postal address: Same as above? Please tick this box,


Postal code: \_\_\_\_\_

Authorised individual details:  
 Title: \_\_\_\_\_  
 First name: \_\_\_\_\_  
 Surname: \_\_\_\_\_  
 ID number: \_\_\_\_\_  
 Email address: \_\_\_\_\_  
 Cell phone number: \_\_\_\_\_  
 Other contact number: \_\_\_\_\_

Wealthport (Pty) Ltd, Registrars on number 2012/025870/07 Version\_May22 1 of 4 items

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## FICA requirements



### FICA requirements checklist

Please supply copies of the FICA documents listed below:

1. **Natural Persons**

1. A South African barcoded iden by document or passport for a foreign na onal with three specimen signatures.
2. Proof of residence / address (not older than three months).
3. The first page of the client's bank statement/cancelled cheque.
4. An official document issued by SARS reflecting the tax registrars number or a letter confirming that the client is not registered for tax indicating the reason.

2. **Minors**

1. Minor's unabridged birth certificate, South African barcoded iden by document or passport.
2. Confirmation of legal guardianship.
3. FICA documents for the guardian as set out in 1.1 and 1.2 for Natural Persons.
4. The first page of the client's bank statement/cancelled cheque.
5. A letter or request from the guardian to manage the minor's investment and receive relevant communications from Wealthport as the authorised person.

3. **South African companies**

1. CML/Memorandum of Incorporation (COI/15.1A). Proof of registration should reflect the directors' details (ICR99).
2. Proof of business address (not older than three months).
3. A letter of authority/resolution from the Board of directors specifying the following: Natural person(s) authorised to transact on behalf of the company.
4. A South African barcoded iden by document or passport for a foreign na onal with three specimen signatures for all directors.
5. Documents as set out in 1.1 and 1.2 for all individuals authorised to act on behalf of the company.
6. A South African barcoded iden by document or passport for a foreign na onal with three specimen signatures for individual(s) with a shareholding of 25% or more.
7. Proof of registration on incorporation and proof of address for any legal entities with a shareholding of 25% or more.
8. The first page of the entity's bank statement/original cancelled cheque.
9. An official document issued by SARS reflecting the tax registrars number.
10. Proof of VAT registration if applicable.
11. Written confirmation of the company's shareholding.

4. **Foreign companies**

1. An official document of incorporation approved by the foreign regulator.
2. Proof of business address (not older than three months).
3. A letter of authority/resolution from the Board of directors specifying the following: Natural person(s) authorised to transact on behalf of the company.
4. Documents as set out in 1.1 and 1.2 for individuals authorised to act on behalf of the company.
5. Documents as set out in 1.1 and 1.2 for individual(s) with a shareholding of 25% or more.
6. A South African barcoded iden by document or passport for a foreign na onal with three specimen signatures for all directors.
7. Proof of registration on incorporation and proof of address for any legal entities with a shareholding of 25% or more.
8. The first page of the entity's bank statement/original cancelled cheque.
9. An official document issued by SARS reflecting the tax registrars number if issued.
10. Proof of VAT registration if applicable.
11. Written confirmation of the company's shareholding.

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GLOBAL EXPERTISE

INNOVATION

1LIFE VANTAGE

OUR PRODUCTS

APPLICATION FORMS

CONTACT US

LET'S TALK 1-TO-1™

[brokers@1life.co.za](mailto:brokers@1life.co.za) to  
discuss our partnership  
opportunities.

<http://www.1life.co.za/fa>

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