

New Business Checklist for Quotations & Installation

New Scheme- Burial Society (6 months waiting period)

Quote

- Constitution
- Membership data with Full names, Surname, ID number, contact number, and physical address
- Quote Requisition form

Installation :

- Membership data with Full names, Surname, ID number, contact number, and physical address
- Application forms(3 months' time frame)
- Fully completed Group Proposal form
- Bank confirmation letter
- Constitution
- Quote
- Siron screening report
- Proof of payment

New Business – Funeral Parlour (6 months waiting period)

Quote

- Membership data with Full names, Surname, ID number, contact number, and physical address
- Brochure(if applicable)
- Quote Requisition form

Installation

- Cipro documents
- Membership data with Full names, Surname, ID number, contact number, and physical address
- Quote
- Proof of banking
- Quote
- Siron screening report
- Proof of payment
- Fully completed Group Proposal form

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Directors: Karl Socikwa (Non-Executive Chairman) | Preston Speckmann (Lead Independent Non-Executive Director) |
Seadimo Chaba (Independent Non-Executive Director) | Rojje Kisten (Independent Non-Executive Director) |
Lindi Dlamini (CEO) Johann Grobler (Non-Executive Director) | Robert Goff (Non-Executive Director) |



New Business Existing - Burial society (From Underwriter)

Quote

- Claims ratio (12 months)
- Membership data from a previous underwriting with Full names, Surname, ID number, contact number, and physical address (Excel format)
- Claims Experience (12 months)
- Claims list
- Constitution
- Quote Requisition form

Installation:

- **All of the above**
- Membership data from a previous underwriting with Full names, Surname, ID number, contact
- Quote
- Siron screening report
- Proof of payment
- Fully completed Group Proposal form

New Business Existing- Self Underwriting (Burial Society)

QUOTE:

- Constitution that illustrates the current benefit
- Membership list Full names, Surname, ID number, contact number, and physical address
- Quote Requisition form (Excel format)
- 12 month Bank statement [illustrating both positive and negative cash flows] account in the name of the society.
- Contribution receipts for members/ Original records of individual members when they joined the society .This could be in the form of application forms, book of records etc.
- Quote Requisition form

INSTALLATION:

- **All of the above**
- Membership data from a previous underwriting with Full names, Surname, ID number, contact
- Quote
- Siron screening report
- Proof of payment
- Fully completed Group Proposal form