

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



New Business Existing- Funeral Parlour (From the Underwriter)

QUOTE:

- Membership list Full names, Surname, ID number, contact number, and physical address (Excel Format)
- Quote Requisition form
- Master Policy document
- Claims list
- 12 months Claims Experience
- 12 months Claims Ratio

INSTALLATION:

- **All of the above**
- Cipro documents
- Membership data with Full names, Surname, ID number, contact number, and physical address
- Quote
- Transfer Letter (if scheme is serving notice period with underwriter)
- Siron screening report
- Proof of payment
- Fully completed Group Proposal form

New Business Existing- Funeral Parlour (Self-insured)

Quote:

- Membership data with Full names, Surname, ID number, contact number, and physical address (Excel format)
- 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.
- 12 month Bank statement [illustrating both positive and negative cash flows] account in the name of the Parlour
- Brochure
- 12 months claims list
- Quote Requisition form

INSTALLATION:

- **All of the above**
- Cipro documents
- Membership data with Full names, Surname, ID number, contact number, and physical address
- Quote
- Siron screening report
- Proof of payment
- Fully completed group proposal form



New Business Employer/Employee Groups

Quote:

- Membership data Full names, Surname, ID number, contact number, and physical address
- Proof of payslip /Payroll list
- **SMME** – letter of appointment with the company letterhead (where applicable)
- Quote Requisition form

Installation

- **All of the above**
- Commission based/ full time salary / Weekly
- Person responsible for payments (employer/employee)
- CIPRO Documents
- Nominated beneficiary or the policy holder
- Quote
- Fully completed Group proposal form
- Siron Report

Associations/Unions

Quote:

- Membership data Full names, Surname, ID number, contact number, and physical address
- Proof of payslip /Payroll list
- Quote Requisition form

Installation

- Company letterhead
- Membership data Full names, Surname, ID number, contact number, and physical address
- CIPRO Documents
- ID Copy of the Directors/Organisation officials
- Fully Completed Group Proposal form
- Siron Screening Report
- Proof of payment