

Absa Trust Employee Beneficiary Fund

Adding Value to Natal Joint
Municipal Funds and guardians.



**A BUSINESS THAT MAKES
NOTHING BUT MONEY IS
A POOR BUSINESS.**

-HENRY FORD

IDEASCRUNCH.COM

Innovative options



Flexible



Income

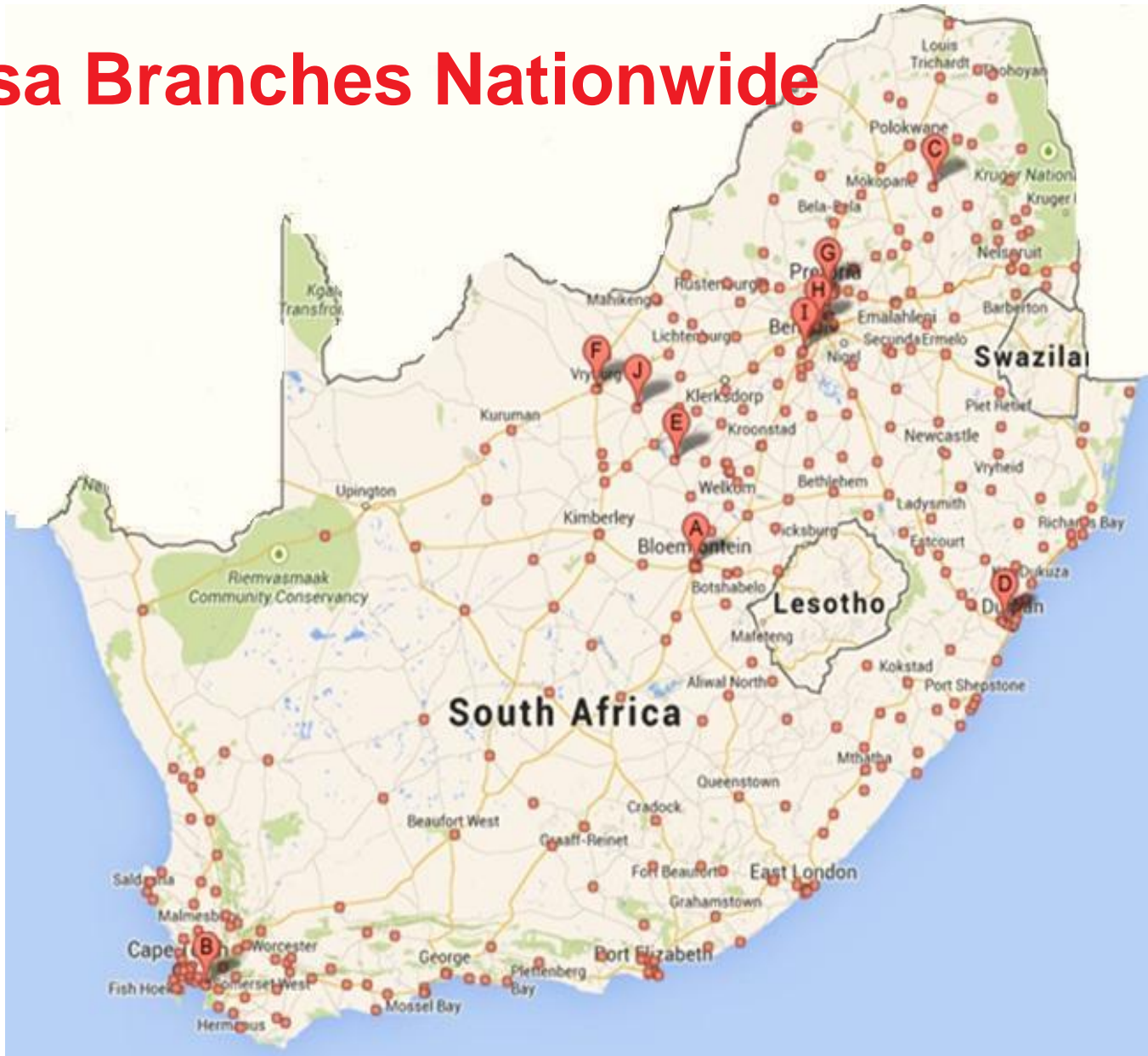


Growth



Balanced

Absa Branches Nationwide



Communication



Tracing



Personal Service



Management and staff

- Admin staff
- Consultants
- Managers



Accountability and relationships

- One administrator that deals with the guardians and beneficiaries
- Relationship building with the guardian and the Fund
- Paying a monthly income to the guardian based on the amount received
- Interest earned on amount is what we pay out
- Looking after the school fees
- Annual Confirmation of Existence with Benefit statement
- Stop payment if not received
- Notify of change in address and banking details
- Trusted brand and track record



Adding value to guardians & beneficiaries

- ❑ Communication:
 - ❑ Standard Letters
 - ❑ Annual Benefit statement
 - ❑ Confirmation of Existence form
 - ❑ Notification six months prior to 18 – termination / maintenance
- ❑ Guardian education
- ❑ Phone guardian at inception to verify details
- ❑ Needs analysis
- ❑ Asset allocation model
- ❑ All official languages



Personalised ID card



Partners

- Partner with Funds on their Roadshows
- EB Advisory
- Absa Rewards



Investments

**“Opportunities come infrequently;
when it rains gold, put out the bucket, not the thimble”** Warren

- Sound Investment Policy
- Annual Investment Reviews
- Report by Portfolio Managers



Thank you