

Life Annuities & Investments Quote System

Introducing our new features

At Sanlam, we continually strive to simplify the way our intermediaries work. Last year, we replaced the OfficeQuote desktop package with the new web-based Life Annuities & Investments Quote System to streamline the way our intermediaries do business. We are excited to announce we've added more functionality to the system.



Sanlam is a Licensed Financial Services Provider.



Trusts

Add trusts to policies in a quick and easy process.



Quick quotes and application forms

Intermediaries can generate quotes and application forms for the Fixed Return Plan, Stratus Guaranteed Income Plan and Fixed Return Plan with Income.

Reminder of the existing features:

- A user-friendly dashboard to manage client quotations
- Simple fields for selecting available features
- A focus on a needs-based outcome
- A more intuitive flow for easier navigation between screens, optimised for any device
- Automated features, like weekly rate updates and shared client data

We're confident that these new updates along with the existing features on the platform will help intermediaries add even more value for their clients. If you'd like to find out more about the updated features, visit us at www.glacierinsights.co.za.

Access our new Life Annuities & Investments Quote System via Sanport.