

Top-up existing investments via mobile

Clients with existing discretionary investments or retirement annuities, and who are registered on Secure Services, can now add to these investments themselves using our newly created online functionality.

Simply logon to Secure Services, navigate to the Glacier page and select Top-ups from the menu. You can either direct the top-up amount straight to your existing fund allocation, in which case the amount will be allocated proportionally across your funds. Or you can select to park the funds in the money market fund. After receiving confirmation that the transaction into the money market fund has been finalised, you can log in again and switch or rebalance the amount. You can select any date for the debit order to be processed on these transactions. Financial intermediaries will also receive notification of these transactions - all of which are easily performed using your phone.

The Top Up functionality is currently only available to users that log in to our Secure website with their mobile device. The Sanlam Portfolio app can be downloaded via the App Store as an alternative.

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