

Parmenion

Sanlam Onshore Bond

Welcome to your resource centre for the Sanlam Onshore Bond via the Parmenion platform. Here you will be able to find all the information and documents you need in order to illustrate and submit an application.

Overview

The Sanlam Onshore Bond is an “open architecture” Bond, allowing you to extend your Centralised Investment Proposition to an Onshore Bond wrapper. It is a single premium investment-linked life assurance bond that offers a tax efficient way of taking a regular income.

For full details on features, allowable investments and charges please download the ‘Features and Charges’ document from the resources section below.

Illustrations

Please take a look at **[our step by step guide to completing an illustration.](#)**

You will need to either **[register for Sanlam Online Services < https://www.sanlam-ip.co.uk/Porthos/Reglster.aspx>](https://www.sanlam-ip.co.uk/Porthos/Reglster.aspx)**, or if you are already registered, **[just login < http://www.sanlam-ip.co.uk/Porthos/Login.aspx>](http://www.sanlam-ip.co.uk/Porthos/Login.aspx)**.

Before producing an illustration through Sanlam’s Online Services, you first need to produce an Investment Management Report (IMR) from **[Parmenion’s website < http://www.parmenion.co.uk/>](http://www.parmenion.co.uk/)**. The IMR will provide a breakdown of the costs linked to the Parmenion platform.

Application

To submit an application you will need to complete the Sanlam Onshore Bond application form, below.

If you are using an external Discretionary Fund Manager (DFM), you will also need to complete an Investment Management Agreement (IMA), a copy can be downloaded below.

Once completed, all forms should be sent to:

New Business Department
Sanlam
St Bartholomew’s House
Lewins Mead
Bristol
BS1 2NH

Your checklist:

1. Complete Parmenion IMR
2. Login or Register to Sanlam Portal and complete Onshore Bond Illustration
3. Provide and discuss with Client
 - Illustration

- Key Information Document
- Product Guide
- Parmenion Application form – sign
- Sanlam Onshore Bond Application form – sign
- Terms & Conditions
- For info: Features and Charges; plus Trust documents if required

4. Send Application forms to Sanlam & Parmenion

What's next?

1. Sanlam will process your application (once received) within 72 hours
2. Sanlam and Parmenion will write to client and IFA to confirm account open
3. Further confirmation will be sent from Sanlam and Parmenion as soon as funds are received and cleared ready for trading

Resources

- **Step by step guide to online illustrations**
- **Online user guide**
- **Sanlam Onshore Bond application form**
- **Investment management agreement form**
- **Features and charges**
- **Key Information documents (KID)**
- **Product guide (key features)**
- **Terms and conditions**
- **Statement for client suitability letters**
- **Trust documents**
- **Top-up form**
- **Scenario 1 - for trust planning**
- **Scenario 2 - responding to dividend income changes**
- **Scenario 3 - maxed out on pensions**