

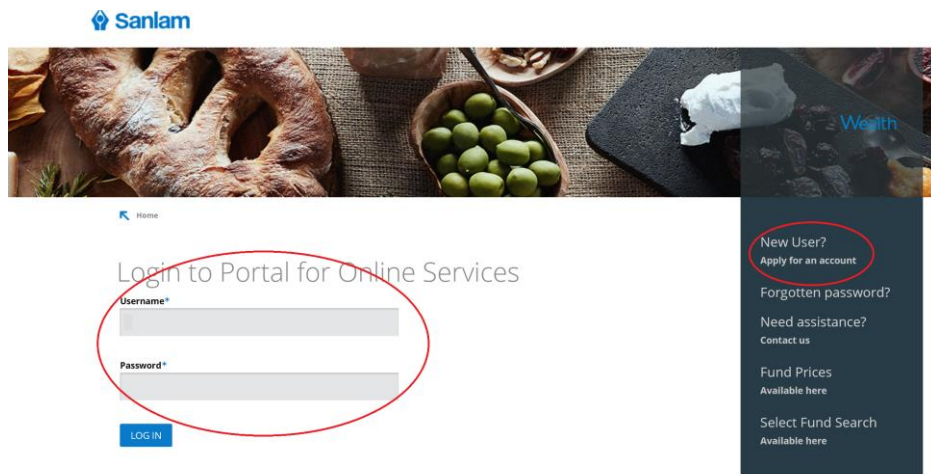
Setting up a Praemium Onshore Bond Illustration

Go onto the Sanlam website www.sanlam.co.uk

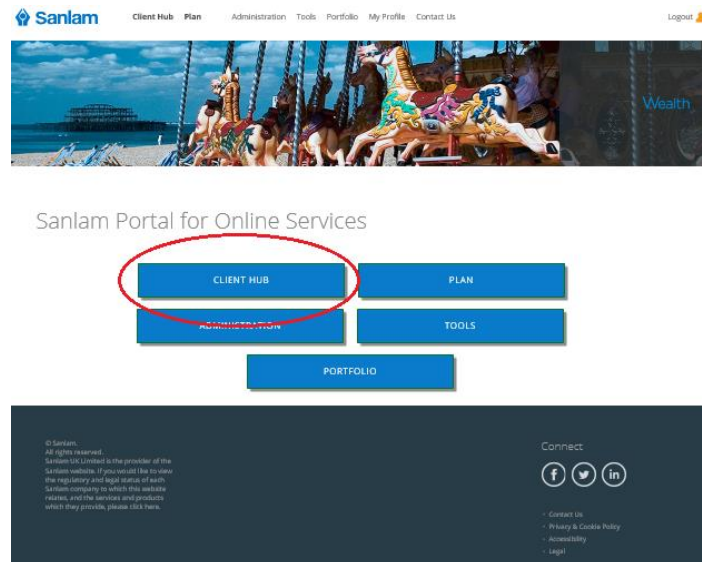
Click **Login** to either login or register*

Choose **Sanlam Investments & Pensions Portal**

*If registering for the first time, please follow the steps and don't forget to Upgrade



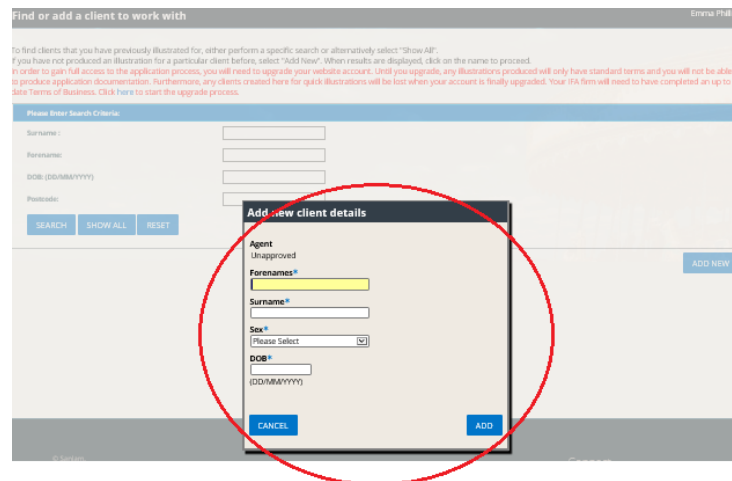
Click **Client Hub**



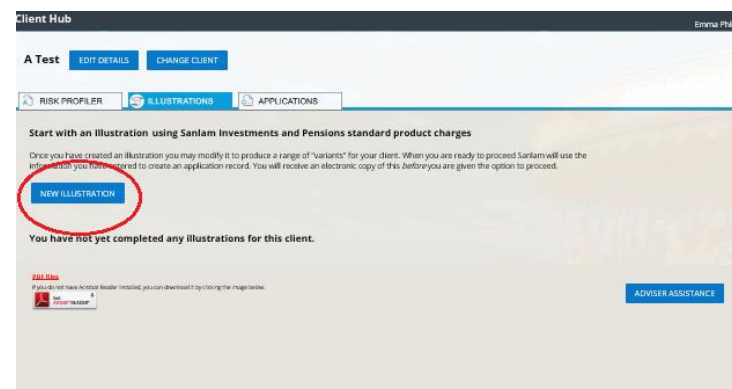
Click **Add New** to start a new illustration



Complete **Client details** and click **Add**



Click **New Illustration**





Under **Platform**, choose **Specialist**
Under **Product**, choose **Sanlam Onshore Bond**
Click **Acknowledge and Continue**

New Illustration Emma Phillips

PRODUCT

For Illustrations on our standalone products (i.e. OneSIPP & Versatile Investment Portfolio) please select 'Specialist', alternatively if you are looking to invest via The Sanlam Portal service please select 'Portal'.

Please select the illustration type, platform and product that you would like to illustrate for:

Illustration Type: Quick Quote
Platform: Specialist
Product: Sanlam Onshore Bond

You are free to illustrate for this line of business but please note you must ensure that your agency has signed the requisite terms of business and contractual agreements before applying for any of these products or investments. If you choose to continue with this illustration, you are acknowledging that you have understood and accepted this requirement.

Please note that illustrations/applications for the following are not available on-line, so please call us on 0117 9752147:

- Top-ups/additions to existing Accounts/Policies
- Pension transfers already in drawdown
- Transfer Pension Portfolio

ACKNOWLEDGE AND CONTINUE

Choose **Applicant** or **Trustee**
Choose **First Death** or **Last Death**
Click **Next**

New Illustration - Life Emma Phillips

CONTRIBUTIONS

Complete the payment value.

Payment Amount (£)*

* This should include any initial adviser fees.

PREVIOUS **NEXT** **SAVE FOR LATER**

Complete the **Initial Fee** and/ or **Ongoing Adviser Fee**

New Illustration - Life Emma Phillips

ADVISER FEES

Please complete your Adviser Fee details.

Agent: Unincorporated internet Agent

Initial Fees

Single Premiums

Initial Rate (%)

Fixed Amount (£)

Ongoing Adviser Fees

Annual Amount (£)

or

Ongoing Rate (%)

Payment Frequency: None

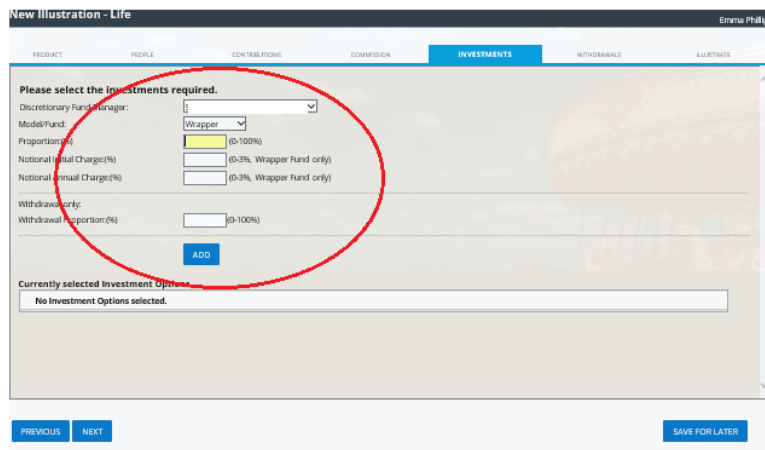
As ongoing adviser fees are treated as withdrawals from the bond for tax purposes, possible unintended tax consequences for your clients need to be considered.

PREVIOUS **NEXT** **SAVE FOR LATER**

In Discretionary Fund Manager choose **Praemium**

In Model/ Fund choose **Wrapper** and select **Proportion (%)** Usually 100%

Click **Add**



Please select the investments required.

Discretionary Fund Manager: []

Model/Fund: [Wrapper]

Proportion (%): [100%] (0-100%)

National Initial Charge (%): [] (0-3%, Wrapper Fund only)

National Annual Charge (%): [] (0-3%, Wrapper Fund only)

Withdrawal Proportion (%): [] (0-100%)

[ADD]

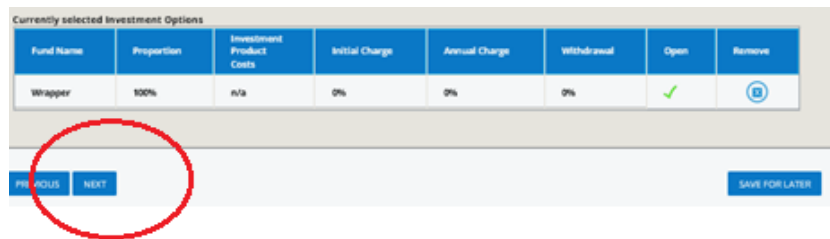
Currently selected Investment Options

No Investment Options selected.

[PREVIOUS] [NEXT] [SAVE FOR LATER]

The below box will appear with a green tick

Click **Next**

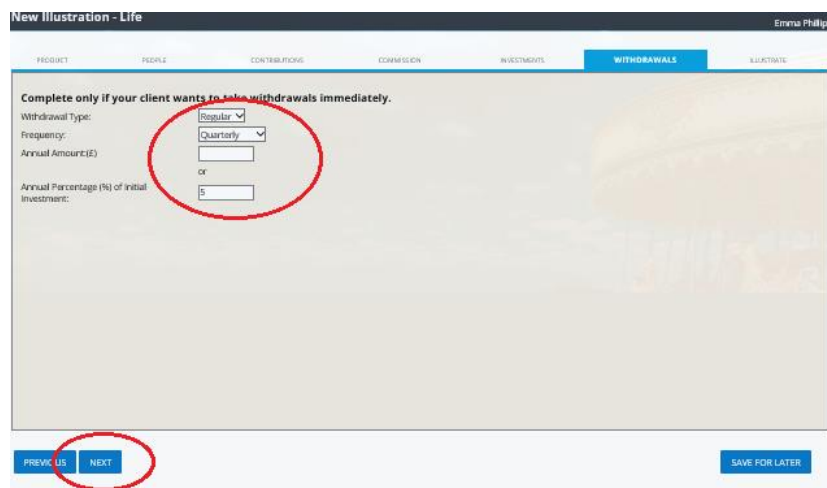


Fund Name	Proportion	Investment Product Costs	Initial Charge	Annual Charge	Withdrawal	Open	Remove
Wrapper	100%	n/a	0%	0%	0%	✓	[]

[PREVIOUS] [NEXT] [SAVE FOR LATER]

Add any **Withdrawals**

Click **Next**



Complete only if your client wants to take withdrawals immediately.

Withdrawal Type: [Regular]

Frequency: [Quarterly]

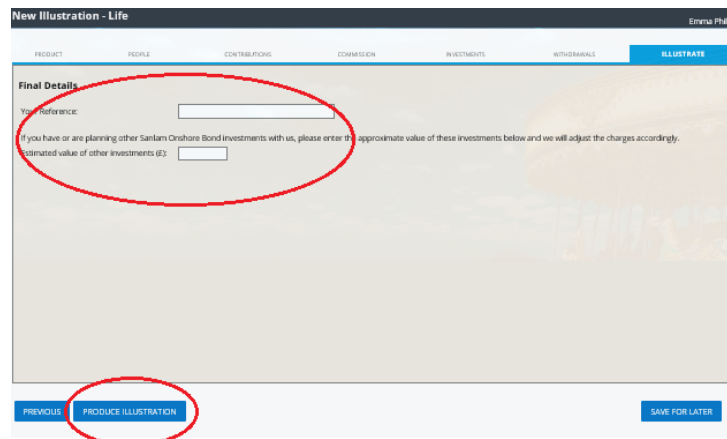
Annual Amount (£): []

or

Annual Percentage (% of initial investment): [5]

[PREVIOUS] [NEXT] [SAVE FOR LATER]

Complete Your Reference, if you wish to rename the illustration
Add any **Estimated values of other investments** with Sanlam
Click **Produce illustration**



Click on the **icon** to view your illustration
Click the **Praemium link** to be taken to the full list of Praemium literature



If you have any further queries, please speak with your Sales Support on 0117 9752093 or email: salesupport@sanlam.co.uk

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