



Legacy Funeral Plan

MANDATE

# MANDATE

## MODULE 1 – UNDERSTANDING YOUR MANDATE (1)

**You will be appointed as a Representative of Affordable Benefits Company (ABC) to sell the Clientèle Legacy Funeral plan to qualifying SASSA Grant holders.**

You will approach and qualify prospective clients by respectfully probing if the client is a SASSA grant recipient (Old age grant and Disability grant only).

You will then use the Clientèle mobile app to check if the client is a SASSA grant recipient and if the client qualifies for the product.

If the client qualifies you will then carefully explain the benefits, waiting periods, and exclusions of the Clientèle Legacy Funeral plan to the client and handle all questions on a non-advice basis.

You will also explain the premium amounts and premium deduction via the SASSA account, based on Regulation 26A.

# MANDATE

## MODULE 1 – UNDERSTANDING YOUR MANDATE (2)

**If the client wants the Clientèle Legacy Funeral Plan, then:**

You will capture the client details on the Clientèle mobile app.

You will accurately capture the client beneficiary details, this is the details of the person who will receive the pay out in the event of the clients death.

During the capture process you must make all the required disclosures, and the client must be fully aware of all product and regulatory requirements.

You will confirm the sale by using the recording function where you and the client must record the confirmation, you in your own voice and the client in his/her own voice.

The client must sign as confirmation and agreement to the sale and take a clear photo of the client's ID

You then copy the policy number, the deduction amount and the deduction start date to insert it into the Q-Link biometric system.

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## MODULE 1 – UNDERSTANDING YOUR MANDATE (3)

Once you have captured the client details on the Clientèle mobile app, you will use the Q-Link biometrics system to authenticate the client and to create an approved mandate.

You must capture the clients' thumb prints and facial biometrics which will then be sent directly to the SASSA and DOA to ensure that the client qualifies and that the client approved the deduction from the SASSA account.

You will use the Clientèle policy number, deduction amount and deduction date that you copied from the Clientèle App. Note that only clients with an ID card can be authenticated via the biometrics system.

Once you have successfully captured the client biometrics, you will issue the Clientèle Legacy Funeral Plan A4 pamphlet to the client where you write down all the relevant information for the client's attention.

Your sale will then be quality assured to ensure that all admin is completed and that the client is happy with the product.

**Once this is done, you have a  
valid sale, well done!**