

# Your Life

Learning Planning Living



**ISASA**

Independent Schools Association of Southern Africa

## Pension Scheme and Provident Fund

### CONSULTANTS' DETAILS

<b>ISASA Team JHB</b> <ul style="list-style-type: none"><li>Marketing and presentations</li><li>Operations and processes</li></ul>	<p>Ms Ipeleng Swedi 011 217 1918 082 379 4543 <a href="mailto:ISwedi@oldmutual.com">ISwedi@oldmutual.com</a></p> <p>Mr Tebogo Mosime 011 217 1833 072 899 0665 <a href="mailto:TMosime@oldmutual.com">TMosime@oldmutual.com</a></p> <p>Ms Sharon Bosii 011 217 1159 076 511 4148 <a href="mailto:SBosii@oldmutual.com">SBosii@oldmutual.com</a></p>
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### CONTACT DETAILS

<b>Member Support</b> <ul style="list-style-type: none"><li>Financial Advice</li><li>Information regarding preservation</li><li>Fund Select Annuity (default annuity/pension)</li></ul>	0860 388 873 <a href="mailto:Membersupportservices@oldmutual.com">Membersupportservices@oldmutual.com</a>
<b>Retirement Fund Members</b> <ul style="list-style-type: none"><li>Current benefit details</li><li>Exit quotes (<b>not iro Pension Scheme DB Part I</b>)</li><li>Follow ups on exits in process</li></ul>	0860 455 455 <a href="mailto:RFAmembers@oldmutual.com">RFAmembers@oldmutual.com</a>
<b>Secure Services</b> <ul style="list-style-type: none"><li>Assistance on how log into Secure Services (where members can access their benefits online)</li></ul>	0860 60 65 00 <a href="mailto:Help-secure@oldmutual.com">Help-secure@oldmutual.com</a>
<b>Pencare</b> <ul style="list-style-type: none"><li>Pensioner queries</li><li>Outstanding Certificate of</li></ul>	0860 40 60 90 <a href="mailto:pencarehelpdesk@oldmutual.com">pencarehelpdesk@oldmutual.com</a>

<p>Existence</p> <ul style="list-style-type: none"> <li>• Advising that a pensioner has passed away</li> <li>• Queries regarding a spouses benefit</li> <li>• Extension of children's pensions</li> </ul>	
<p><b>Client Services</b></p> <ul style="list-style-type: none"> <li>• Individual policies (non- Fund/ Scheme related)</li> </ul>	<p>0860 50 60 70  <a href="mailto:Service@oldmutual.com">Service@oldmutual.com</a></p>
<p><b>Payroll Support</b></p> <ul style="list-style-type: none"> <li>• Help with monthly payroll</li> <li>• How to create a new member category</li> <li>• How to move an employee to another category</li> <li>• How to submit via e-claims</li> </ul>	<p>0860 466 466  <a href="mailto:Payrollsupportservices@oldmutual.com">Payrollsupportservices@oldmutual.com</a></p>
<p><b>HR 911</b></p> <ul style="list-style-type: none"> <li>• What to do with a sick employee</li> <li>• How to handle certain medical conditions</li> <li>• Claims guidance as to whether your case could become a disability claim</li> <li>• Guidance through the claim process</li> </ul>	<p>021 509 3911  <a href="mailto:newclaims@oldmutual.com">newclaims@oldmutual.com</a>  <a href="mailto:gapdisability@oldmutual.com">gapdisability@oldmutual.com</a></p>
<p><b>ISASA Team CT</b></p> <ul style="list-style-type: none"> <li>• Missing Benefit Statements</li> <li>• Inter-school transfers</li> <li>• Transfers from the GDPF</li> <li>• Transfers from or to other funds</li> <li>• Withdrawal quotes (<b>Pension Scheme DB Part I only</b>)</li> <li>• Divorce orders</li> <li>• Housing loan quotes (Pension Scheme DB Part I only)</li> <li>• Details of contribution rate split</li> </ul>	<p>Janine Richards  021 509 2133</p> <p>Zain Ryklief  021 509 5675</p> <p><a href="mailto:ISASA@oldmutual.com">ISASA@oldmutual.com</a></p>