

TRANSPARENT FINANCIAL SERVICES

At Transparent Financial Services, we are ideally positioned to be your specialist retirement fund administrator and financial service provider.



Transparent Financial Services' main business is the provision of benefit fund administration services to retirement and other benefit funds, which enables fund trustees to keep their members informed through continuous, accurate and meaningful reporting and easily-accessible information.

- OUR VALUES
- Integrity and Ethics
- Transparency and Simplicity 🛛 🛞
 - Accuracy and Efficiency
 - Accountability and Customer Service
 - Trust and Dependability 🛛 🕵

OUR STRATEGY

We allow our clients to stick to their proverbial knitting, while we take care of their retirement fund activities.



Our business approach allows employers to focus on their core business and trustees on critical areas, while our team of specialists ensure that the day-to-day functions of their retirement fund activities are taken care of.

OUR SERVICES

- Pension and provident fund administration.
- Bargaining Council fund administration.
- An Intermediary services.
- Monthly administration and payment of pensioners.
- Health services payment administration.
- \bigcirc Umbrella Fund option for non-standalone funds.
- The provision and administration of Pension-backed Housing Loans to members.
- Insurance and assistance benefits.

We pride ourselves in our people, processes and commitment, always striving to provide the best service possible to our clients.

INSURANCE

We provide a comprehensive range of short-term and life insurance products specifically suited to your needs. In addition, we are a registered medical aid broker and can provide your organisation with a comprehensive employee-focused financial services solution.

CONFIDENTIALITY

Our clients can rest assured that all information pertaining to any Fund or member is completely safe.

COMPLIANCE

We make use of an independent compliance officer to ensure adherence to all legislative requirements.

POLICIES & PROCEDURES

To perform our administrative and intermediary duties, we have developed and adhere to various company policies and procedures designed to protect the interests of the members, Funds under Administration and our administration staff.

'Employers should be able to focus on their business and trustees on critical areas. while we take care of the day-to-day functions of their retirement fund activities."

ADMINISTRATION SYSTEM

Transparent Financial Services operates an integrated, fully customised, in-house developed system specifically designed for the South African retirement fund administration market.

ABOUT US (2)

Transparent Financial Services (TFS) was formed in 2006 when it acquired the retirement fund administration business from the South African Typographical Union (SATU).

The company is registered as a Financial Service Provider in terms of the FAIS Act and has a number of agreements in place with major financial institutions to render co-administration services.

TFS, through its subsidiary companies, provides short-term and life insurance solutions. In addition, our expertise has allowed us to expand into the administration of medical aid and medical gap insurance products as well.

Sanlam Life Insurance Ltd acquired a 26% shareholding in the business during the early part of 2016, providing backup and support through access to resources and industry research.











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Company Reg. No: 2005/013904/07 Licensed S13B Retirement Fund Administrator (Reg. No: 24/431). Authorised Financial Service Provider (FSP Reg. No: 42843). Certified Health Care Broker (ORG 4248).

Other companies in the TFS group include Transparent Consulting Services, a registered Credit Provider (NCRCP 11110), and Transparent Administration Services, which specialises in financial services administration.