

1LIFE REFERRAL MODEL

1life

Changing Lives

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The 1Life Referral Model gives you, the financial advisor, greater opportunity to refer clients to 1Life by implementing a bespoke marketing, communication and sales strategy.

With this strategy, 1Life gives you the tools to structure added value for your clients whilst earning a passive income in the process.

WHY PARTNER AND REFER CLIENTS TO 1LIFE?

With the industry regulatory demands (FAIS and RDR) and the increasing costs associated with running a financial planning practice, the financial advisor can no longer be everything to everyone. This means that many financial advisors are specialising in the services they provide and the type of clients they service.

Our unique offer will assist you in looking after your clients. We will:

- Contact the referred client
- Pay you a referral fee for every successful sale we make (no clawback!)
- Handle all post-sale servicing
- Handle all claims
- Give you regular reports on the status of your referrals

However, the referred client will remain your client.



WAYS TO IDENTIFY REFERRAL LEADS

Below we have identified the different types of potential clients as well as what you should look out for when pursuing them.

ORPHAN CLIENTS

- Clients you have not contacted for a long time (usually more than 2 years) and do not deal with any longer.

COMMERCIALLY UNVIALE OPPORTUNITIES

- It may not be financially worth your while to deal with this particular type of business opportunity. We will contact the referred client, giving you a chance to benefit without having to commit time and resources.

COMPANIES AND GROUP SCHEMES

- Companies run by clients that employ staff are a great source of potential business – we can offer their staff top-up cover as well as other value-added services.
- The individual employees may have needs that are not fulfilled in their entirety by the benefits offered on the group scheme. There are often upsell opportunities in these environments, for companies to be seen as offering value to their employees.

MASS CLIENT OPPORTUNITIES

- Large volumes of clients where there is an opportunity to offer risk cover but it is not practical to see all clients face to face.
- The 1Life approach is simple and efficient; we use telephonic communication, which enables us to cover large volumes of clients without compromising on quality.

TRUTH ABOUT MONEY

Along with all of the above, 1Life offers your client access to free value-added services via our Truth About Money initiative.

These services include:

- Wills drafting and estate planning services
- Debt management and counselling
- A financial education course

For more, visit www.truthaboutmoney.co.za

1Life was the first life insurance company in South Africa to offer risk cover telephonically. Our model is simple, paperless and efficient, allowing our clients to be covered within 30 minutes!

Let us assist you so you can focus on what you do best – enhancing the lives of the customers that are essential to your business.

ADDRESS

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