



# Enhancing the retirement funding ecosystem

The ICTS Group of Companies exists to support retirement funds and their members, in collaboration with the funds' mainstream service providers, by specialising in niche services that complement and enhance the overall retirement funding experience.



# Overview

Investment Consulting and Trustee Services (ICTS) is a niche financial services company providing independent support services to administrators, consultants and trustees/manco's in the retirement fund industry. Established in 1995, ICTS has developed long term partnerships with clients, built on consistent delivery. ICTS has been acknowledged by trustees, Principal Officers and service providers for its contribution to support services in the industry.

## Services



### Communication Services

Specialised communication services for retirement funds, to facilitate member understanding and informed decision-making.



### Death Benefit Services

Support for retirement funds in allocating death benefits according to the requirements of Section 37C.



### Independent Trustee Services

Independent trustees and advisory services for retirement fund boards and/or investment committees.



### Legal Services

One of the few dedicated and specialist retirement fund legal services businesses in South Africa.



### Tracing Services

Offering a comprehensive range of solutions for tracing current and former retirement fund members or beneficiaries.



### ICTS Academy

Assisting, through education, trustees, principal officers, manco members and their consultants to fulfil their duties as fiduciaries.



### Wealth Services

Helping formulate financial solutions for both individuals and businesses.



### Partners

30+ years of C-suite experience and industry expertise to review strategies, challenge thinking, and facilitate effective discussions among decision makers of retirement funds and their providers.



### Pensions World SA

Keep up with the latest news and trends about South African retirement funds and employee benefits with a quarterly publication, available digitally and in hard copy.



**EB**net.

An independent employee benefits knowledge portal for industry professionals and retirement fund fiduciaries in South Africa.



### Motswedi Economic Transformation Specialists

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# How you will benefit from ICTS services

## If you are a Retirement Fund:

- 01 Help past employees and their families and reduce unclaimed benefits**  
Ensure that your past employees/members receive the funds that are due to them, thereby having a meaningful impact on their lives and that of their families, and in the process meet regulatory requirements to constantly reduce the amount of unclaimed benefits in a fund.
- 02 Efficiently dealing with death benefit considerations**  
Avoid unnecessary paper work and ensure the fast resolution of the disbursement of retirement fund death benefits while strictly following the requirements of Section 37C of the Pension Funds Act.
- 03 Better perform your duties**  
Access quality training on retirement related matters through the ICTS Academy.
- 04 Obtain expert opinion**  
Receive expert opinion and support in dealing with any legal matters relating to retirement funds
- 05 Access up-to-date and quality content**  
Remain abreast of the latest news and trends in the retirement industry with access to quality content produced by a broad range of experts.

## If you are a service provider in the retirement industry:

- 01 Benefit from variable costs**  
Reduce unnecessary costs and risk from your business if you are an administrator or consultant by accessing complimentary services that aren't cost efficient to run in house.
- 02 Enhance your advice**  
Seek the support of specialised professionals in select niche fields (like legal, death benefits, black-owned asset managers) to compliment and support the advice you offer to your retirement fund customers.
- 03 Reach your market and build your brand**  
Target your brand building and awareness campaign directly at retirement industry fiduciaries through our publications.
- 04 Showcase your expertise**  
Contribute content to showcase your skills and build your profile.

## Key ICTS features to help you

### The ICTS Team

Having processed over 2 million traces since 2008, conducted over 10,000 death benefit investigations, trained over 55,000 fiduciaries, and published in excess of 2,000 articles.

### Specialisation & Quality

ICTS focuses and specialises in niche areas that enhance the overall retirement funding ecosystem. It aims to be the best in those areas and employs specialists in their specific fields. As an example, it is the only entity in the market to offer a legal advisory capability that focuses solely on retirement fund legislation, facilitated by highly experienced retirement law experts.

### Success Rates and Turnaround Times

ICTS is well known for its strong turn-around times and delivers an exceptional success rate in terms of tracing, document collection, and death benefit claims investigations.

### Experience

ICTS has the ability to trace beneficiaries worldwide. Its training material/courses have been developed over the years by experienced specialists in a range of applicable fields.

### Use of Technology

ICTS uses modern on-line telephony and call centre capabilities with a proprietary operating system, ICTS Connect, to facilitate its tracing processes and death benefit investigations. The ICTS Academy provides the choice of a fully on-line learning experience that allows fiduciaries to learn anytime, anywhere. Its publications are all available on-line in a user-friendly and convenient manner.

### Cost Effectiveness

ICTS prides itself on its cost effectiveness, service delivery and nimbleness in supporting retirement funds and their advisors according to market needs.



# Contact

Contact us today to learn more about our services and how we can help you.

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Please view our interactive websites to get more information on our services and various business units:

[www.icts.co.za](http://www.icts.co.za)

[www.ictstracing.co.za](http://www.ictstracing.co.za)

[www.ebnet.co.za](http://www.ebnet.co.za)

[www.pensionsworldsa.co.za](http://www.pensionsworldsa.co.za)

[www.motswedi.co.za](http://www.motswedi.co.za)

