



## REQUEST FOR PROPOSALS (RFP)

### Retirement Benefit Counsellor Services

### Easy Umbrella Fund

The Easy Umbrella Fund invites suitably qualified and registered service providers to submit proposals for the provision of Retirement Benefit Counsellor Services. The appointed provider must deliver services fully aligned with the Pension Funds Act, Default Regulations, FSCA Conduct Standard 19 of 2021 (RF), and prevailing industry best practice.

### Scope of Services Required

- Provision of retirement benefit counselling as prescribed under Default Regulations 37 & 38 of the Pension Fund Acts.
- Compliant retirement benefit counselling in line with applicable legislation and FSCA Conduct Standards.
- Counselling for all default investment, preservation and annuity strategies of the Fund.
- Delivery of counselling via digital, telephonic, or in-person channels.
- Clear and accessible communication materials for members.
- Support for Section 14 transfer counselling when required.
- POPIA compliance, cybersecurity measures, and secure data handling.
- Operational compatibility with the Fund's Administrator (RISE).

### Proposal Requirements

- Company Profile – relevant experience and key personnel.
- Regulatory Credentials – FSCA accreditation, FAIS compliance, POPIA adherence.
- Counselling Methodology & Framework – engagement process and QA controls.
- Pricing Structure – setup, per-member/session, and ongoing fees.
- Service level commitments & Turnaround Times.
- At least two institutional retirement fund references.

### Submission Details

Email proposals to: [Kletsholo@easyretire.co.za](mailto:Kletsholo@easyretire.co.za)

Subject Line: RFP – Retirement Benefit Counsellor Services: Easy Umbrella Fund

### Closing Date: 24 February 2026

*Shortlisted providers will be invited to present to the Board of Trustees.*

EasyUmbrellaFund (registration number 12/8/38201)

• Jayna Pancham /Principal Officer • Isgaak Jarodien/Chairperson • Andrew Craze/Independent Trustee  
• Deresh Lawangee/Trustee • Nicola Comninos/Trustee

• Address: WeWork – Coworking Office Space, 173 Oxford Road, Rosebank, Gauteng 2196