



# ONEPLAN CLIENT REFERRAL PROGRAM TERMS AND CONDITIONS



We are excited that you are choosing to participate in the **“Oneplan Client Referral Program”** (hereafter referred to as the “Program”). Your participation is strictly subject to the Program terms and conditions. Please read the following terms and conditions carefully before participating in the Program.

This Oneplan referral agreement is an agreement between Oneplan “us” and “you” our existing Oneplan Client.

## Qualified referrals and compensation must meet the following requirements:

- (i) a “new prospective client”

For the purposes of this Program a “new prospective client” include:

- (a) the referred person but does not include a person who is a current or a pending Oneplan client;
  - (b) the referred person must reside and have a contact number within the borders of South Africa;
  - (c) the referred person must have legal capacity.
- (ii) “contactable”

For the purposes of this Program “contactable” includes valid contact details, which will enable us to successfully contact the “new prospective client”, which details may be in the form of a valid contact number or email address. Any invalid or duplicated details will be disqualified.

Oneplan maintain the right to make the final determination as to whether the referral meets all the requirements to be considered a qualified referral.

- (iii) “compensation”

For the purposes of this Program “compensation” means an amount of R300 will be paid by means of crediting the referrer’s nominated Oneplan Policy premium account, for all contactable referrals but only if the premium is successfully collected from the referred party. The maximum permissible compensation for referrals may not exceed R900 or 3 (three) policy referral payouts on collected referred debit order per calendar month. Should this exceed the R900 this credit will roll over to the next months premium.

## Acceptance and Termination:

By participating in the “Oneplan Client Referral Program” you agree:

- (i) that you have read, understand and will abide and be bound by these terms and conditions;
- (ii) that Oneplan reserve their right to terminate the program without notice to you or your referrals;
- (iii) that notification of a successful referral would be receipt of the R300 compensation, and no further notification will be sent for unsuccessful referrals; and
- (iv) that Oneplan reserve their right to terminate your participation in the program should it be abused, and/or policy at its discretion.

## POPI Compliance

By submitting the form, you certify

- (i) that you and your contact both live in South Africa;
- (ii) that you give Oneplan permission to retain your name and email address for the purpose of any subsequent enquiry by the referred person.

Oneplan will contact all contactable referrals once and all information obtained for uncontactable referrals will be destroyed in line with POPI standards.

## Other Terms and Conditions

In the line with the Financial Advisory and Intermediary Services Act when referrals are made you are not allowed to provide any advice or intermediary services to new prospective clients, or act as a go between for Bryte and the other party.

We will not be liable for any illegal or unlawful actions or misrepresentations made by you to the referrer in respect of this service or any Bryte product.

These Program terms are in addition to the “Oneplan Terms of Use” as displayed on the [www.oneplan.co.za](http://www.oneplan.co.za) website.

The [www.oneplan.co.za](http://www.oneplan.co.za) website would contain up-to-date information on the current Program.

## Late Debit Order Rejection

If the person who signed up from the referral does a late rejection on their debit order, Oneplan reserves the right to remove the R300 credit that was awarded to the referrer. This will be done at Oneplan’s discretion, and the amount will be deducted from the referrer’s credited premium.