



# TREATING CUSTOMERS FAIRLY MISSION STATEMENT

## FEBRUARY 2025 | VERSION: 5

### TREATING CUSTOMERS FAIRLY

Treating Customers Fairly (TCF) was implemented by the Financial Services Conduct Authority to ensure that the fair treatment of customers is embedded within the culture of all financial services providers and representatives. Oneplan's TCF commitment is not just because of the FSCA requirements but because it is the right thing to do and beneficial to our clients. The six fairness outcomes we are committed to are:

#### 1 CULTURE AND GOVERNANCE

Oneplan clients can be confident that they are dealing with a provider where the fair treatment of its clients is central to its culture.

#### 2 PRODUCT DESIGN

Oneplan's products and services are designed to meet the needs of identified customer groups and marketing is targeted accordingly.

#### 3 CLEAR INFORMATION

Oneplan's clients are given clear information and are kept appropriately informed before, during and after point of sale.

#### 4 SUITABLE ADVICE

Where customers receive advice, the advice is suitable and takes account of their circumstances.

#### 5 PERFORMANCE AND SERVICE

Oneplan endeavours to always provide its clients with products and services that perform as promised and that they have come to expect.

#### 6 CLAIMS, COMPLAINTS AND CHANGES

At Oneplan, we strive to make it as easy and convenient as possible to change products, submit claims, switch providers or lay complaints.

### OUR PROMISE TO YOU - WE ARE COMMITTED TO:

- Delivering prompt, friendly, efficient, courteous, and relevant service at all times.
- Having efficient processes in place.
- Continuously improving and identifying new technologies and endeavouring to excel in the delivery of our service.
- Assisting you in making an informed decision whether it may be a new product, claim or amendment of your policy.
- Only providing you with products that you need.



## WHAT YOU CAN DO TO HELP

You can assist us with TCF by doing the following:

- Providing and disclosing all the relevant information regarding your personal and medical information to enable us to provide you with products and services suitable to your needs.
- Telling us how we can improve our service and product.
- Informing us of any changes to your personal information to ensure we keep our records up to date.
- Reading through all your policy wording, associated documents and regular communications carefully and familiarising yourself with our processes and products.
- Letting us know if there is any aspect of our products that you do not understand or are not satisfied with.

## FEEDBACK

If we do not fulfil this promise, you may submit a complaint via [complaints@oneplan.co.za](mailto:complaints@oneplan.co.za) which we will acknowledge and attend to in line with our Complaints Resolution Policy.