



**PHOENIX**  
FINANCIAL SERVICES GROUP  
UNDER OUR WING



# LAUNCH NEWSLETTER

2 November 2020

[www.phoenixgrp.co.za](http://www.phoenixgrp.co.za)  
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## About Us

*We are in business to provide better benefits to more people so that the overall quality of life improves. We aim to disrupt the financial services sector by pioneering cloud-based, advanced, digital solutions that open access to support, health, protection and financial planning benefits.*

*All our clients and their families have access to Phoenix Assist that provides a full range of assist, medical access, support, trauma, medical emergency transportation, legal and financial access benefits at no costs.*

## Our guiding philosophy and principles

We are committed to the principles of:



**Integrity:** doing what we say we will do and leading by example



**Balance:** creating a wide stakeholder orientation in our ecosystem and championing greater equality in society



**Empathy:** care and deep respect for all people



**Service:** giving back and serving the greater good

We believe that how we live, engage, unite, build relationships and do business can improve. We aim to lead the way for other firms with a greater commitment to transformation, equity, job creation, compassion and empathy.

Ultimately, we aim to address the complex challenges facing our society and country.

Visit our NEW interactive website: [www.phoenixgrp.co.za](http://www.phoenixgrp.co.za)





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## Reimagining the workplace

Phoenix FSG was birthed in the midst of the global pandemic. The rise of new business models during the pandemic is imperative, as new leaders are required to contribute to the economy, create employment, reskill the workforce and create hope.

Phoenix is pandemic and crisis resilient since regulators authorised, licensed and accredited us during the COVID-19 pandemic.

We have reimagined the workplace with a strong focus on interacting with customers, employees and employers in a positive productive way, in an environment that is simple to understand, safe and convenient.



Our vision of the future is unashamedly enthusiastic and will be enabled through creativity, innovation and differentiation. **As suggested in Greek mythology, Phoenix signifies birth and re-emergence.** We will rise as a stronger, smarter, more innovative and more powerful Group in the financial services space.

In the recovery phase of the pandemic, we also recognise our role in the sector as a new leader with a greater commitment to transformation, equity, job creation leading with compassion and empathy.

There is no better time to work with industry, government, healthcare authorities and regulators to find solutions for the complex challenges facing our country.

## Reinventing customer services

The pandemic brought trauma that surrounds us in respect of illness and the loss of loved ones that will remain with us for many years to come.

At Phoenix FSG we approach customer services with new elements of compassionate listening, taking informed action and providing feedback in a spirit of empathy and kindness. Our hand-holding approach is to take the client all the way to the goal or solution.





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## What we provide



Phoenix FSG intends to provide a new generation type of consulting, advisory and support services by establishing a number of specialised subsidiary companies in the areas of healthcare, wellness, employee benefits, short term personal and commercial lines as well as life assurance product lines.

Our mission is to offer unrivalled services to individuals and companies irrespective of size, benefitting from the reciprocity of product participation and enjoying a bespoke product range with value-added benefits. Critical mass and economies of scale together with a niche selection of recognised product providers and highly skilled staff will ensure an ecosystem of mutual benefit.

We value operational resilience, customer success, innovation, equality and socio economic development.

## Risk management

Covid-19 and many more pandemics have been predicted. Phoenix FSG believes that businesses can be resilient to such catastrophes by a proactive approach to risk management.

We have built an effective risk management response supported by technology that is digitally enabled to compliment crisis management ensuring business continuity.



## Transformation and empowerment

Phoenix FSG achieved a Level 1 B-BBEE and allocated 5% to a staff share trust at Group level. In the spirit of compassion, Phoenix FSG recognises the devastation caused by the pandemic and therefore will contribute a total of 15% of net profit after tax to socio economic and enterprise development.

We believe the financial services sector is primed for transformation and transition. The mindset change came about by creating a nerve centre that is cloud-based, digital, agile and technologically advanced.





## The Pandemic

Birthered in the midst of the global pandemic, Phoenix FSG arises with a focus on differentiation, innovation and creativity. As Phoenix FSG emerges together with the recovery phase of the pandemic, we recognise our role in the sector as a new leader with a greater commitment to transformation, equity, job creation and compassion.

### Under Our Wing



SAFER

BEYOND

RIGHT

SUPPORT

## Phoenix Wellness

### About

We believe the pathways to wellness include health engagement, awareness and participation. Phoenix Wellness strives to remove the barriers to entry to ensure everyone has equal access to improving their health and wellness ultimately improving the quality of life.

### Products and Services



Phoenix Assist



Wellness Days



Employee Wellness Programmes



Covid-19 Assist



Disease Management



Psycho-Social Counselling and Support



Lifestyle Coaching & Education



Workforce Wellness Reporting

*Phoenix Assist: Value-add employee assist program for all clients at no cost*



# Phoenix Healthcare Consultants

## About

We are committed to levelling the playing field between the “have” and “have nots” to provide all South Africans with equal access to quality private healthcare. Our offering has been developed to eliminate gaps in cover and supported by a world class cloud-based service delivery model.

We believe that true wellness is a result of engaging in wellness activities, health screening, disease management as well as the protection of wealth and prudent financial planning leading to overall peace of mind for employees and employers.

We do not discriminate in our offering or service delivery model. The following; medical scheme, primary healthcare and gap cover clients can access our support, consulting and advisory services at no additional costs.



Medical schemes



Primary Healthcare



Gap Cover



International Travel



International Healthcare Cover



# Phoenix Employee Benefits

## About

We are focused on demystifying employee benefits and increasing participation on group life protection benefits and retirement fund savings. We believe everyone should have peace of mind and a better quality of life.

Our ecosystem of niche providers, simplified consulting practices and highly-skilled staff has been developed to ensure employees are adequately covered and retirement savings goals are achieved.

One of competitive advantages is found in our fee-for-service commission structures.



- 1** Fee-for-service based instead of regulated commissions/fees.
- 2** Zero commission on investments
- 3** Integrated overall reduction in fees for clients participating on health or other services.



**Umbrella Funds**



**Group Life**



**Group Funeral**



**Preservation Funds**



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# Phoenix Financial Planning Services

## About

We believe in financial planning for the present, the future and the next generation. Our desire is to forge lifelong relationships with you and your family as you journey through the different stages of your life. Our main goal is to help you to protect yourself, your loved ones and to prosper thereby improving the quality of life.

We are an independent financial planning practice and our advice is backed by the niche product providers that we have selected. The development of a prudent financial plan and strategy that is evaluated regularly or at life-changing events provides for wise decision-making to protect families and to prosper.

Your dreams, hopes and goals for you and your family are important for us and we contribute to your ambitions by being transparent with negotiated commission/fees.

Our strength and unique unrivalled offering is found in the ecosystem of cloud-based CRM and quotation programs, niche providers offering a wide range of financial solutions, high-skilled financial planners and a mission to make your dreams a reality.



- Life and Disability Cover
- Income Protection
- Education Planning
- Retirement Fund Planning
- Estate Planning
- Business Continuation Planning (Key Person Insurance)
- Succession Planning (Buy & Sell arrangements)
- Funeral Plans
- Wills, Trusts and Estates



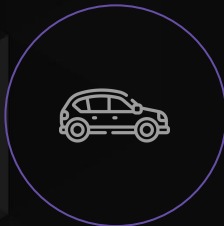
# Phoenix Insure

## About

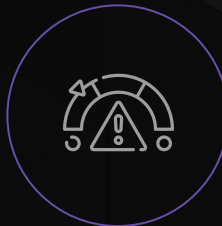
We believe that treasured possessions like cars, household contents and businesses must be appropriately insured against loss, damage, theft and interruptions.

Our niche recognised partners enable us to provide specialist advice and support services to reduce the burden on your lifestyle and interruption of your business when things go wrong. Phoenix Insure is a key driver in our belief that everyone deserves a better quality of life.

A focus area for Phoenix Insure is support and specialised business insurance for small and start-up businesses. This is in line with our contribution to enterprise development.



**Car/Motor Vehicle  
Limited Cover**



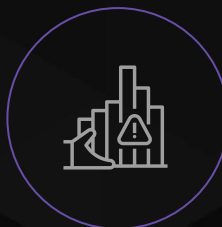
**Car/Motor Vehicle  
Comprehensive  
Cover**



**Building Cover**



**Household Cover**



**All Risk Cover**



**Business  
Insurance**



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**THE SAMSODIEN**  
**FOUNDATION**  
 B E Y O N D C A R E

Phoenix Financial Services Group is the main funder of the Samsodien Foundation NPO that was birthed during the Covid-19 pandemic. The Foundation is a non-profit registered as a public benefit organisation offering inbound assist and outbound outreach services for public benefit.

**The three tiers of the foundation are:**



**Corporate  
governance**



**Inbound 24/7/365  
Assist Support**



**Outbound  
Outreach services**

**Members of the public can register their families for support services using the “Roxy Assist Services” at no cost.** Requests for assistance and support for Outreach programmes are provided in accordance with available funding and dependent on community needs and donor requirements.

The Board is made up of three directors including the founder and public Officer Clayton Samsodien, as well as three unconnected persons having accepted Fiduciary Duty to ensure that effective and efficient corporate governance is implemented and maintained at all times.

The Foundation has appointed external financial accountants and auditors to ensure compliance with relevant financial controls, tax regulations and relevant financial procedures and practices.

***The Samsodien Foundation website will launch on 12 November 2020***





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# THANK YOU

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