



# Johannesburg Bowls Association

The District where it's at

The Wanderers Club  
21 North Street  
Illovo, 2196

Phone: 011 880 8000  
email: [secretary@jbabowls.co.za](mailto:secretary@jbabowls.co.za)  
[www.jbabowls.co.za](http://www.jbabowls.co.za)

25 September 2019

TO: CLUB PRESIDENTS  
CLUB SECRETARIES

## CIRCULAR 25/2020

### YOUR CLUB WILL PAY YOUR 2019/2020 BSA AND JBA AFFILIATION FEES (TOTAL R570) IF YOU SUPPORT OUR SPONSOR!

Dear member, we have some exciting news!

Barton Financial Services (Pty) Ltd, **the broking house administering the Perfect Delivery policy**, has been sponsoring Bowls since 2000. Their estimated investment in the game of bowls over the past 20 years exceed R20 million. They are prepared to invest more in the game and its players! Once again they will sponsor the 2020 Perfect Delivery Bowls SA Open, "B" and Veteran Inter-district tournaments. They are also sponsoring the 2020 Perfect Delivery Gauteng Challenge and the 2020 Perfect Delivery Gauteng Open. They are also the title sponsor of the 2019/20 Perfect Delivery JBA League, JBA Pairs and JBA Masters.

**If you take out a motor, home and/or business insurance policy with them before the end of November 2019, they will pay the club 50% of your first month's premium as a referral fee! This financial contribution to the club is extremely important for the well-being of our club!**

**That is not all! If you join them before the end of November 2019, you will be exempt from paying the 2019/2020 BSA and JBA affiliation fees! That is a bonus of R570!**

Why not contact Barton? You will probably save on your premiums if you do choose them!

Barton is a registered short-term insurance broker with the Perfect Delivery Motor & Home insurance policy, designed specifically to suit the needs of lawn bowlers. As a full-fledged broker, they also have access to most of the large insurers in SA (such as Santam, Bryte, Momentum, Old Mutual, Auto & General, King Price, Discovery, Hollard, etc). They also offer commercial insurance solutions.

Perfect Delivery is a policy designed to suit the motor and household insurance needs of bowlers. The short-term insurance risk profile of the bowling fraternity (at an average age older than 60) is excellent and ensures a very competitive premium. In addition, the Perfect Delivery product offers certain benefits that suit the lifestyles of bowlers. The policy wording is clear and comprehensive, defining a truly superior product. Best of all, is their friendly staff. Their employees and co-workers are professional insurance advisors. They treat their clients professionally, but also personally. Barton does not use any call centres!

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#### JBA Executive Committee

President: Debra Ferguson

Members: Hon. Treasurer Keith van der Linde, Cindy Hoffman, Dave Naughton,  
Colin Schneiderman, Terry Turner



Barton can also offer you alternative products if the Perfect Delivery product does not suit your specific needs in full.

Barton always guarantees the best combination of premium, cover and service!

**This is an excellent offer. Simply contact Perfect Delivery on 0860 999 888 or send your current insurance policy schedule to [info@perfectdelivery.co.za](mailto:info@perfectdelivery.co.za). If you were to take out a policy with them, you will not only save on premiums, you will also support your club.**

Yours in Bowls



**Ann Davies - District Secretary**  
**Johannesburg Bowls Association**

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**JBA Executive Committee**

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Members: Hon. Treasurer Keith van der Linde, Cindy Hoffman, Dave Naughton,  
Colin Schneiderman, Terry Turner





## **Referral fee incentive offer to JBA bowls clubs – 2019/2020**

Dear President,

Barton Financial Services (Pty) Ltd is the broking house administering the Perfect Delivery policy. We have been sponsoring Bowls since 2000 and our estimated investment in the game of bowls over the past 20 years exceed R20 million. We are prepared to up our investment in the game and its players! Once again we are about to sponsor the 2020 Perfect Delivery Bowls SA Open, “B” and Veteran Inter-district tournaments. We are also sponsoring the 2020 Perfect Delivery Gauteng Challenge and the 2020 Perfect Delivery Gauteng Open. We are also the title sponsor of the 2019/20 Perfect Delivery JBA League, JBA Fours and JBA Masters.

Please find attached our growth strategy for the 2019/20 season. Your support of this strategy will be of financial benefit to the club and its members. All we, Barton, ask from you, is to motivate your club members to take out a motor, home and/or business insurance policy with us.

### **The benefits for the club**

We pay 50% of the first month’s premium to the club as soon as the premium had been paid. This benefit also applies to business policies referred to us. This means that any successful referral of a small business insurance policy with a monthly premium of R10 000, translates to a R5 000 benefit payable to the club. That is not a bad return for your efforts!

We also sponsor the club by paying an amount equal to the BSA and JBA affiliation fees (R250 plus R320) for every successful referral joining us before 30 November 2019!

### **The benefits for the members**

Barton is a registered short-term insurance broker. Our specialised product, the Perfect Delivery Motor & Home insurance policy, is designed specially to suit the needs of lawn bowlers. As a full-fledged broker we also have access to most of the large insurers in SA (such as Santam, Bryte, Momentum, Old Mutual, Auto & General, King Price, Discovery, Hollard, etc). This means that we can offer personal lines and commercial insurance solutions to the broader insurance market.

Perfect Delivery is a policy designed to suit the motor and household insurance needs of bowlers specifically. The short-term insurance risk profile of the bowling fraternity (at an average age older than 60) is excellent and ensures very competitive premiums. In addition, the Perfect Delivery product offers certain benefits that suit the lifestyles of bowlers. The policy wording is clear and comprehensive, defining a truly superior product. Best of all, is our friendly staff. Our employees and co-workers are professional insurance advisors. They treat our clients professionally, but also personally. We do not use any call centres!

Our comprehensive service means that we are in a position to offer your members alternative products if the Perfect Delivery product does not suit their specific needs.

## **Perfect Delivery**

### ***Motor, Home & Business Insurance***

Perfect Delivery: a product of Barton Financial Services (Pty) Ltd /n produk van Barton Finansiële Dienste (Edms) Bpk  
Director / Direkteur: GC Swanepoel CA (SA) / GC Swanepoel GR (SA)  
FIA Member/ Lid: 010000461

FSP 5254 Reg. No. / Nr. 93/05378/07  
PO Box / Posbus 72444 Parkview 2122  
Tel. 0861 999 888 Fax / faks. 086 246 5093



We always guarantee the best combination of premium, cover and service!

**What do we expect from your club?**

The club already communicates with its members regularly using Facebook, WhatsApp, SMS, e-mails, newsletters etc. If the club uses these various communication tools to convey this message, we will supply content for the initial and subsequent messages, as well as regular updates on relevant information about insurance in general and possible pitfalls.

We have attached a draft copy of the initial communication intended for your members. We also attached a questionnaire. Please complete it and return it to me at [gcs@barton.co.za](mailto:gcs@barton.co.za) to register your club as a participant in this strategy!

Regards,

GC Swanepoel

Managing Director

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## Perfect Delivery

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## **GROWTH STRATEGY 2019/2020 SEASON**

### **Financial Referral model for the 2019/2020 bowls season (1/10/2019 – 30/9/2020)**

1. Due to the high number of requests for sponsorships we receive, we have decided to offer a financial benefit to all bowls clubs in South Africa. This initiative is available to all bowls clubs in South Africa and could make a substantial financial contribution to the club's financial wellbeing.
2. The club's executive committee will take ownership of the initiative.
3. The financial benefit to the club will be as follows:
  - 3.1 PD will pay the club a referral fee equal to 50% of the first month's premium on all successful leads, i.e. converted into policies.
  - 3.2 A quarterly prize of R2500 will be paid to the top club.
  - 3.3 Only clubs exceeding a minimum of R5000 monthly premium will qualify for the R2500 prize.
  - 3.4 An annual prize of R10 000 will be paid to the top club. (01/10/2019 – 30/09/2020)
  - 3.5 Only clubs exceeding a minimum of R20 000 monthly premium will qualify for the R10 000 prize.
  - 3.6 The referral fees and prizes set out above in clauses 3.1, 3.2, and 3.4 will be applicable for the remainder of the 2019 calendar year, starting 1 October 2019 and the 2020 calendar year.
  - 3.7 The above referral fees and prizes are applicable to bowls related referrals i.e. personal lines policies for bowlers and commercial policies related to bowlers as well as non-bowls related referrals i.e. personal lines policies for non-bowlers and commercial policies related to non-bowlers.
  - 3.8 Additional incentives to the clubs as well as the bowlers will be communicated to you from time to time.

### **Terms & Conditions**

1. Barton is entitled to cancel the agreement between the company and the Club at any time without any notice period. Any referral fee due will still be paid as per the agreement.
2. The Club's Executive is not allowed to give any insurance advice, In fact, he/she needs to state this to any prospective policyholder before dealing with the person's insurance matters.
3. The Club's Executive is allowed to share the benefits of the products offered to bowlers, non-bowlers and businesses as communicated to them.
4. The Club's Executive will not be allowed to share any confidential information about the company, its processes, products, marketing strategies, etc with any other party.
5. The Club's Executive will not be allowed to share any private and/or insurance related information of any prospective client or policyholder with any 3<sup>rd</sup> party.
6. Cold leads (list of people, i.e. club's database or any other list of people) where the referral is not expecting a call from Barton/Perfect Delivery will not be contacted by the company.
7. The company will continue to do its own marketing via existing clients on a member gets member (MGM) basis.
8. The company will continue with various marketing initiatives via Facebook, sponsorships, old lists of bowlers who have given us consent to contact them, cancelled policyholders, etc.
9. The Club will only be entitled to a referral fee if the referral was given to us by the Club.

10. The referral fee as set out in the Financial Referral model above will be payable as follows:
  - 10.1 50% of the first month's premium (of a monthly policy) payable to the Club on or before the 7th of the month following the month in which the first premium was received.
  - 10.2 If the referred policy is an annual policy, the annual premium will be divided by 12 to establish the monthly premium for purposes of calculating the referral fees as set out in 3.1 above.
  - 10.3 If the referral fee in total (100% of the first month's premium of a specific policy) is more than R5 000, it will only be paid after the 3<sup>rd</sup> monthly premium was received.
  - 10.4 Referral fees will be cut in half on all "once off" business, i.e. travel insurance, event insurance.

### **Products and services offered by Barton/Perfect Delivery**

1. The brokerage that facilitates the process between the policyholder and the insurer is Barton Financial Services (Pty) Ltd, a registered financial services provider (FSP 5254).
2. Perfect Delivery is a product of Barton directed to the needs of lawn bowlers. The Perfect Delivery product is expanded and includes the needs of tennis players, hockey players and squash players. The benefits of the Perfect Delivery policy is set out on the brochure, but it includes the following:
  - 2.1 R5000 (national competitions), R3000 (Regional and District competitions) and R2000 club competitions) is paid if a bowler picks up an 8 or a 9. These amounts can be doubled up if there is more than 1 family member in the team. It is important to understand that this is only applicable to competitions and not for tabs in or any social game. A Full House (4 shots in singles or 6 shots in 2 bowl trips or 3 bowl pairs) does not qualify.
  - 2.2 No excesses for policyholders 50 years and older.
  - 2.3 No excesses on vehicle claims if the policyholder has been claim free with us for 3 years or more.
  - 2.4 Automatic inclusion of funeral cover (R10 000 for R25 p/m). The cover can be doubled up for R50 p/m.
  - 2.5 Car hire in case of total loss of or accidental damage to your comprehensively insured vehicle is automatically included.
  - 2.6 Automatic inclusion of Motor and Home assistance – 24/7.
  - 2.7 Premiums are guaranteed for 12 months.
  - 2.8 Bowls bag, bowls and any bowls related items in the bowls bag is automatically covered at no cost on an All Risk basis up to an amount of R8 000 per set, or R16 000 per claim. The same applies to tennis players (R10 000/R20 000), hockey players (R10 000/R20 000) and squash players (R5000/R10 000).
  - 2.9 We deal with all the major insurance companies and we can offer any other insurer that might suit the specific needs of the player better.
3. We also offer club insurance under the Perfect Delivery brand.
4. If the prospect is not a bowler/tennis player/hockey player or squash player, then we can offer such person any of the other insurance products underwritten by the panel of insurers we deal with.
5. We also offer business/commercial insurance and travel insurance.

6. We also offer specific specialised products such as PI cover, Directors and Officers cover, Hospitality & Leisure, 4x4 vehicle cover, Marine insurance cover, Thatch cover, Event cover, etc.

**Barton 2019/20**  
**Referral incentive application form**

**Club**

**District**

**President 2019/2020 season**

Name

Surname

E mail

Cell number

**Treasurer 2019/2020 season**

Name

Surname

E mail

Cell number

**Club banking details**

Bank

Account number

**2019/2020 Affiliation & Subs**

BSA	R250.00
District	R
Club	R

**Number of bowlers in club**

Men

Ladies

**Method of communication with your members**

	Yes	No	How frequent
E mail	<input type="text"/>	<input type="text"/>	<input type="text"/>
SMS	<input type="text"/>	<input type="text"/>	<input type="text"/>
Whatsapp	<input type="text"/>	<input type="text"/>	<input type="text"/>
Facebook	<input type="text"/>	<input type="text"/>	<input type="text"/>
Newsletter	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Language of communication**

<input type="checkbox"/> Afrikaans	<input type="checkbox"/> English	<input type="checkbox"/> Both
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**Website address**

**Signature of Club President**

Please email this completed form to: [gcs@barton.co.za](mailto:gcs@barton.co.za)

You are also welcome to contact me direct on 083 252 4812 if you want to discuss this financial incentive opportunity!