

Financial Planning Client Value Proposition



Anel Coetzee
Sanlam Financial Adviser
Global Financial Solutions

Sanlam Financial Advisers strive to be the most professional and client-centric financial advice sales organisation in South Africa that treats clients fairly whilst doing business in a profitable and sustainable way.

Authorised by Sanlam Life to advise on:

- ⌚ Long-term insurance products
- ⌚ Retirement annuities
- ⌚ Collective investment schemes

How am I qualified?

RE 5 Regulatory Examination
BSc Honours in Psychology
National Certificate in Wealth Management

Sanlam training:

Financial Advice
Investment Specialist
Advice to members of GEPIF
Estate planning

Who are my clients?

My clients are responsible individuals that want to achieve financial security and strive towards financial independence. My clients include:

- ⌚ Professionals
- ⌚ Graduates
- ⌚ Business owners, executives and SME's
- ⌚ Young people embarking on their careers
- ⌚ Retirees and people close to retirement
- ⌚ Families

Holistic financial planning services offered

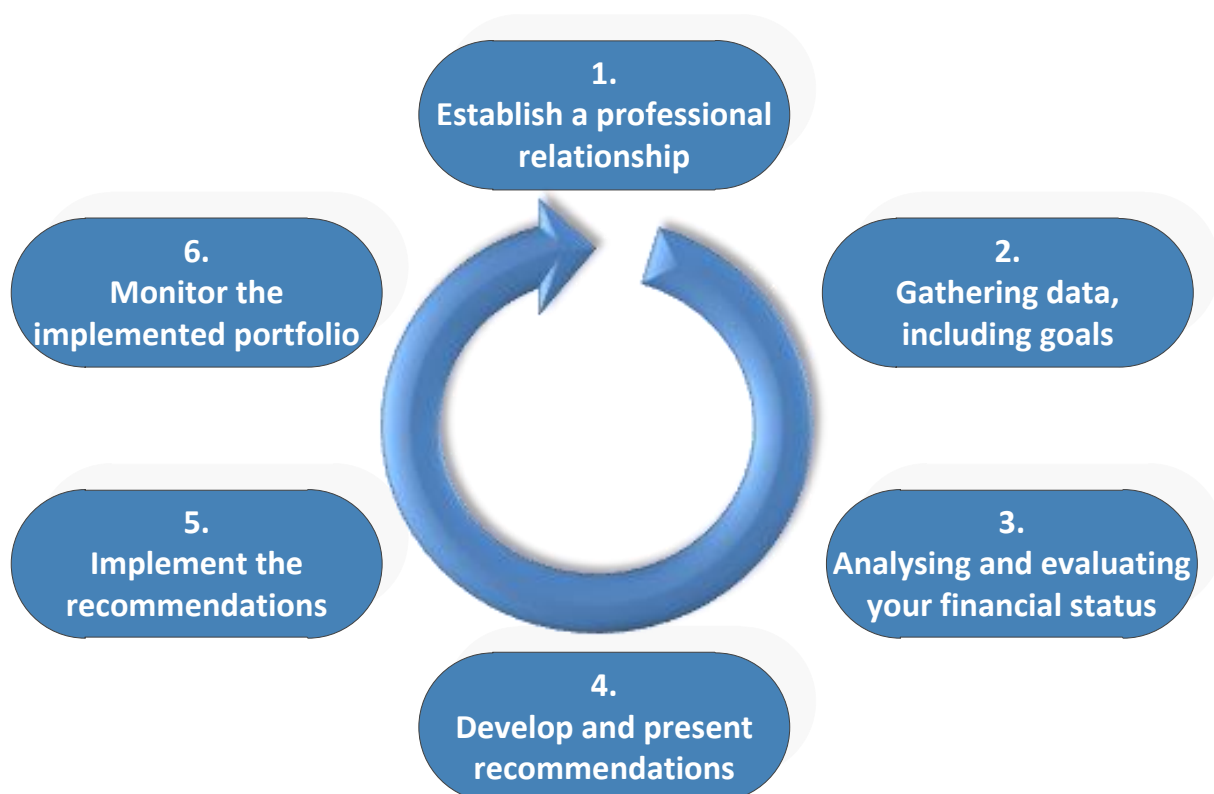
As an authorised representative of Sanlam, I am proud to offer products that are competitive, transparent, tailor-made for your needs and excellent value for money.

I am authorised to give advice for:

Planning for Professional Individuals	⌕ Products for Professionals & Graduates
Risk Planning	⌕ Capital needs in the event of Disability, Death, Sickness, Trauma or Accident ⌕ Income needs in the event of Disability, Death or Sickness ⌕ Funeral Benefits
Planning for retirement and at Retrenchment	⌕ Retirement Annuities ⌕ Preservation Funds ⌕ Risk Conversion Options
Post-retirement Planning	⌕ Guaranteed Annuities ⌕ Living Annuities
Investment Planning	⌕ Tax-free Savings Accounts ⌕ Endowments ⌕ Collective Investment Schemes ⌕ Linked Investments through Glacier by Sanlam ⌕ Structured Solutions with Guarantees
Estate Planning	⌕ Wills ⌕ Trusts
Retirement Fund Benefits	⌕ Financial planning advice to fund members

Financial planning process

My financial planning process is based on the six steps used by professional financial planners world-wide



What will my services cost?

If my advice leads to the implementation of a solution, I am remunerated by way of commission and fees by Sanlam.

For more information, contact me at

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