

Financial Planning Client Value Proposition



Anél Louw
Sanlam Financial Adviser

I provide clients with financial guidance that is transparent, thoughtful, and rooted in genuine care for their long-term wellbeing.

Authorised by Sanlam Life to advise on:

- ⤵ Long-term insurance products
- ⤵ Retail Pension benefits (Retirement/Preservation)
- ⤵ Collective investment schemes
- ⤵ GEPP

How am I qualified as a professional financial planner?

- ⤵ Matric (Grade 12)

What do I offer my clients?

As a professional financial planner, I offer you, as my client, personalized financial planning tailored to your goals, values and life stage.

Clear, straightforward communication that simplifies and empowers informed decision-making.

Ongoing reviews and proactive engagement to keep you on track as life evolves.

My promise is to support you at every stage of your life, protecting what matters today while building sustainable wealth for tomorrow.

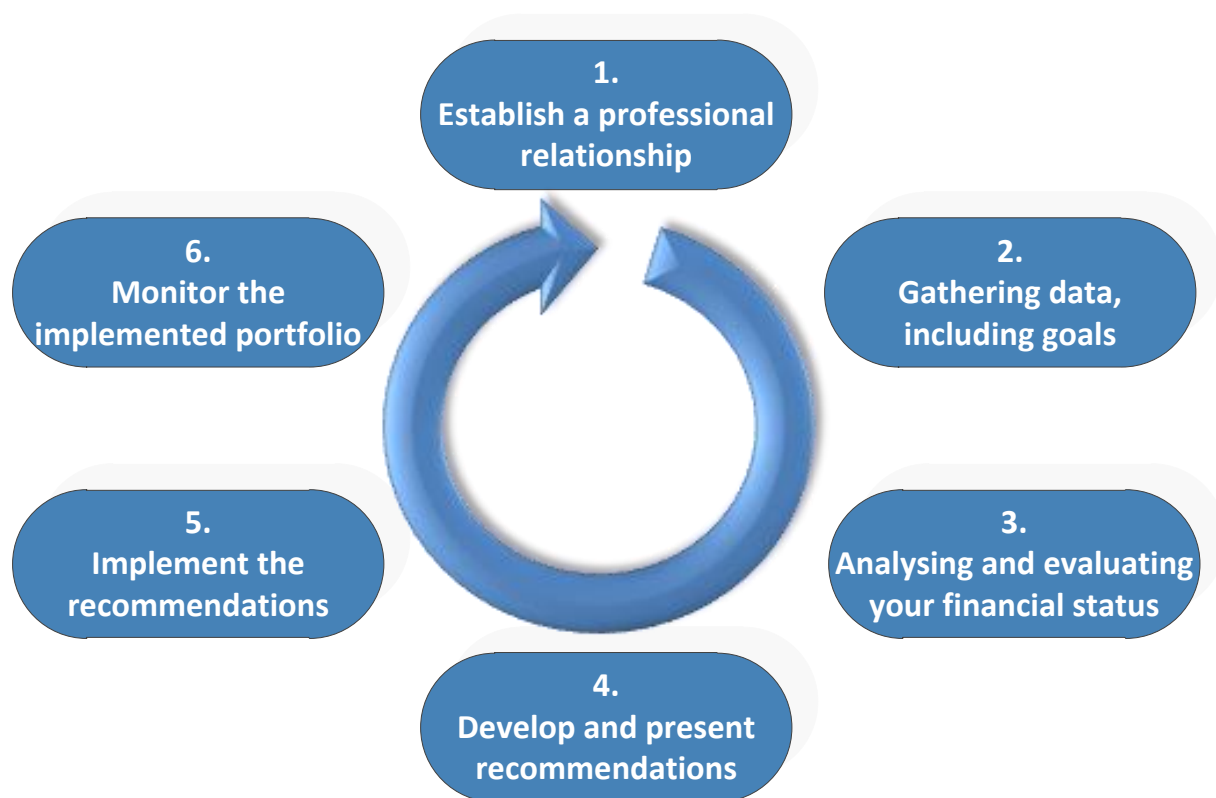
Why should you speak to me?

I am committed to building lasting relationships based on trust, transparency, and consistency, ensuring that you feel informed, confident, and supported at every stage of your financial journey.

If you're looking for financial guidance that puts understanding, trust, and empowerment at the centre, I'm here to walk that journey with you.

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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