

Financial Planning Client Value Proposition



Angus Arendsen
Senior Sanlam Financial Adviser

I am a Professional and Trusted Financial Planner in the Johannesburg Region servicing clients across South Africa and even internationally.

I am passionate and wholly dedicated to empowering my clients to make informed decisions regarding their finances. I assist clients with aspects relating to Budgeting, Saving, Investing, Retirement Planning, Risk Planning, Estate Planning and Credit Management.

Authorised by Sanlam Life to advise on:

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

How am I qualified as a professional financial planner?

- Regulatory Exam 5
- Investment Specialist
- Bachelor of Commerce
- Post graduate diploma in financial planning

Member of Financial Planning Institute

- FSA™ professional (Financial Services Advisor™ professional)

What do I offer my clients?

As a professional financial planner, I offer you, as my client, personalised professional advice and a wide range of financial solutions – from financial planning and insurance to investment advice and retirement planning and ongoing financial advice and services backed by Sanlam.

I will keep you informed continually about matters relevant and material to you, in respect of your financial plan as we have agreed on. We also offer short-term insurance with our partners MiWay and Santam. And if any of your financial needs can't be addressed in my practice, we'll source an expert for you!

Why should you speak to me?

I am passionate and wholly dedicated to empowering my clients to make informed decisions regarding their finances. You will enjoy a long-lasting professional partnership with me as we work together towards achieving your financial goals.

I am committed to providing you with financial solutions that are aimed at addressing your needs and tailor-made to suit your personal goals and circumstances.

Who are my clients?

I have learned to deal with clients in a great variety of scenarios, from Business Owners and Judges and Directors to Doctors and Teachers. I am however very fond and passionate about working with clients going onto Retirement and equipping them to make the best decisions for securing their Post Retirement income in both the Public and Private Sector.

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

- Professional
 - Graduates
 - Business owners, executives and SME's
 - Farmers
 - Concerned husbands, wives and parents
 - Young people embarking on their careers
 - Retirees
 - People close to retirement
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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
Business Assurance	⤵ Buy & Sell Solutions ⤵ Key Person Insurance ⤵ Contingency plans
Short-term Insurance	⤵ Personal Lines ⤵ Commercial Lines
Retirement Fund Benefits	⤵ Financial planning advice to fund members
Tax Planning	⤵ Income Tax Practitioner

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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