



Audrey Mogano

CLIENT VALUE PROPOSITION

Your financial confidence is my priority

My role is to empower you to make confident and informed financial decisions by providing personalised financial planning and advice aligned with your goals, needs and circumstances.

I work with you to build a sound financial foundation, plan for a comfortable retirement, protect the people and assets that matter most to you, and create a clear strategy for achieving your financial goals. Through ongoing advice and regular reviews, I help ensure that your financial plan remains relevant as your circumstances and priorities evolve.

WHAT I CAN HELP YOU WITH

Insurance	Protection solutions designed to help safeguard your income, family and financial commitments.
Retirement	Planning and solutions to help you build towards a financially secure retirement.
Investment	Investment planning aligned to your objectives, time horizon and risk profile.
Business Insurance	Solutions to help protect key business interests, continuity and financial commitments.
Financial Planning	A holistic approach to understanding your goals and developing a practical financial strategy.
Sanlam Reality	Access to lifestyle, wellness and value-added benefits available through the Sanlam Reality programme.
GAP Cover (Referral)	Referral to suitable GAP cover solutions to help manage potential medical shortfalls.
Fiduciary Services	Support with wills, estate planning and the orderly transfer of wealth.
Medical Cover (Referral)	Referral to suitable medical cover solutions based on your needs and circumstances.

MY COMMITMENT TO YOU

I believe financial planning is more than selecting products — it is about understanding your life, your aspirations and the people who depend on you. My commitment is to provide trusted, professional advice and ongoing support so that you can make informed decisions and live with greater financial confidence.