

## Financial Planning Client Value Proposition



<<Full Name>>

Sanlam Financial Adviser

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
- ⤵ Business insurance products

### How am I qualified as a professional financial planner?

- ⤵ Regulatory Exam 5
- ⤵ Bcomm Honours in Business Management
- ⤵ Postgraduate Diploma in Entrepreneurship

### What do I offer my clients?

As a professional financial planner I offer you, as my client, professional, ongoing financial advice and services backed by Sanlam.

I will provide you with objective and balanced financial advice of the same quality I would like to receive myself in the same situation.

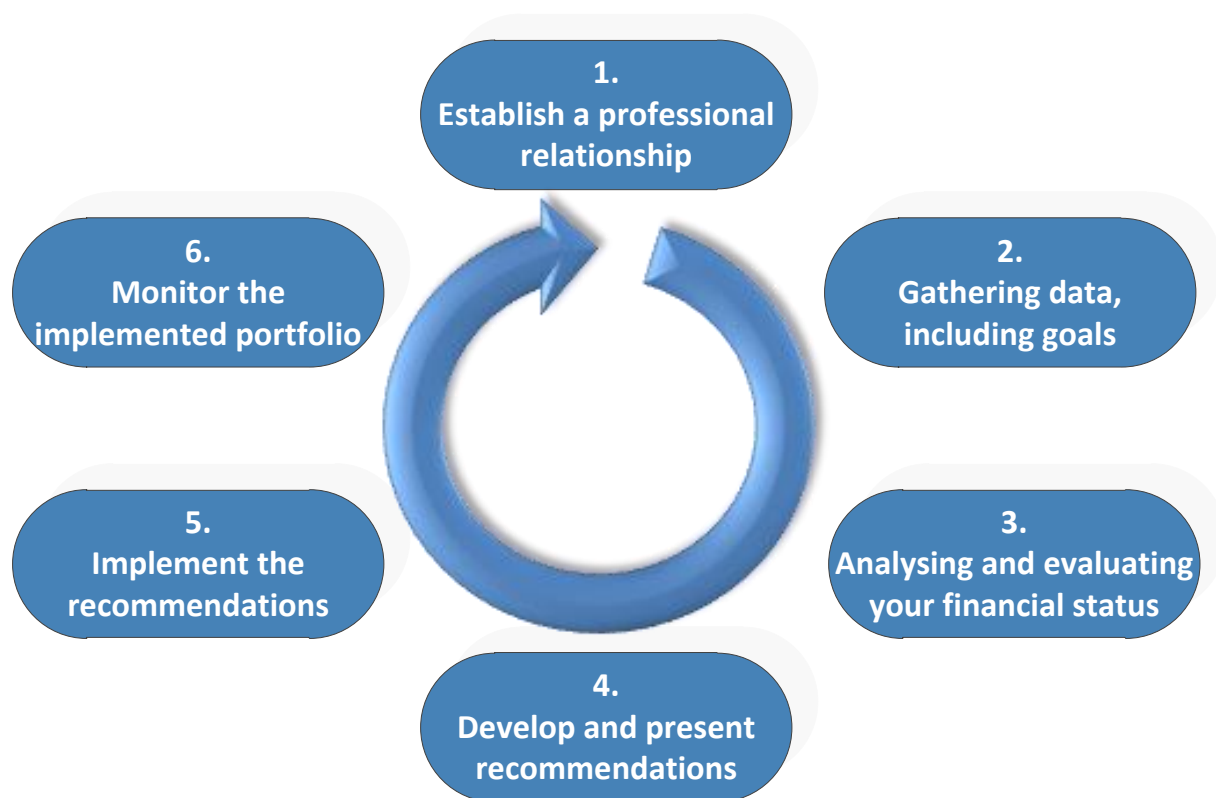
I will keep you informed continually about matters relevant and material to you, in respect of your financial plan as we have agreed on.

### Why should you speak to me?

You will enjoy a long-lasting professional partnership with me as we work together towards achieving your financial goals.

## Financial planning process

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



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### 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.

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### For more information, contact me at

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Email: << >>bontle.phokungwane@sanlam4u.co.za

Mobile number: << >>0685243196

Fax: << 06 >>