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.

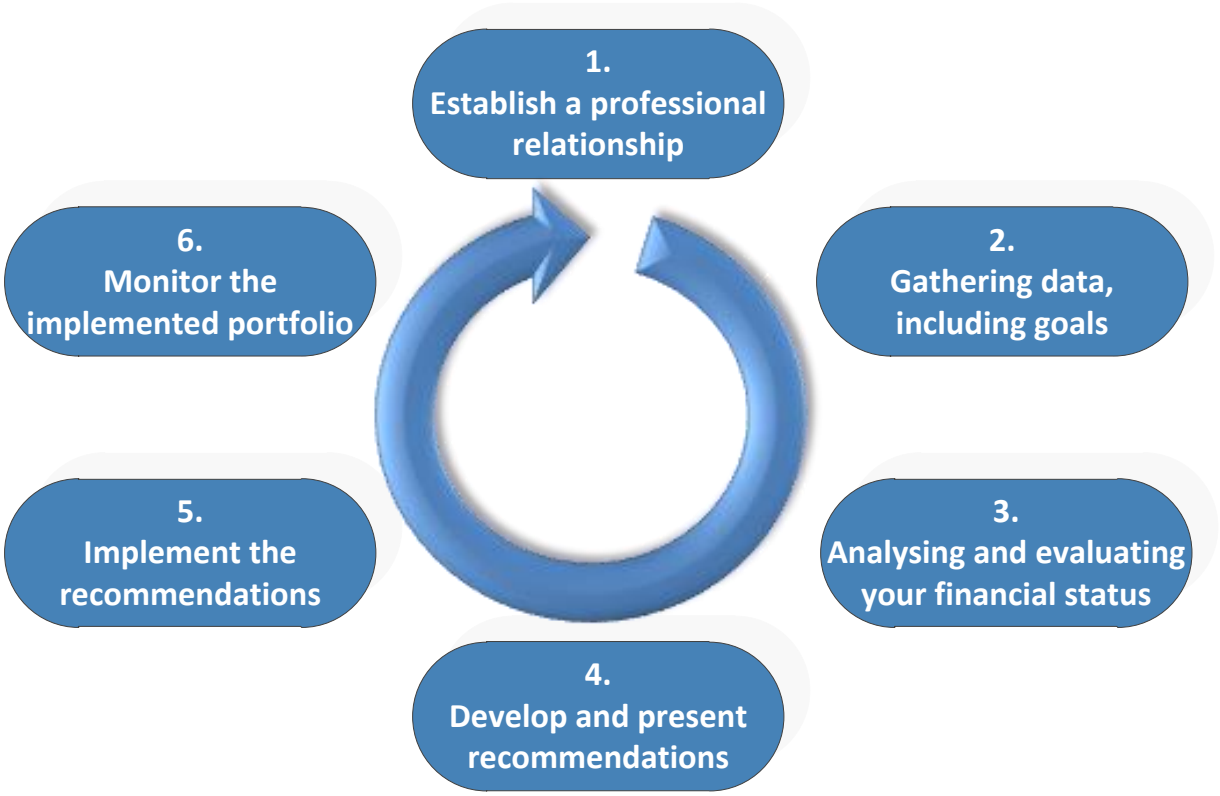
I will keep you informed continually about matters relevant and material to you, in respect of your financial plan as we have agreed on.

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



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

Office number:	<<>>	Email:	<< >>
Mobile number:	<< >>	Fax:	<< 06 >>