

Financial Planning Client Value Proposition



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Sanlam Financial Adviser
Team Oli4

Live with Confidence

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
- ⌕ Estate Planning

How am I qualified as a professional financial planner?

- ⌕ Regulatory Exam 5
- ⌕ National Certificate NQF 6 Financial Management
- ⌕ Senior Management Development NQF 7 (SMDP)

What do I offer my clients?

As a financial services professional, I provide my clients, their families, friends and communities access to world class financial services, products and platforms offered by Sanlam. My responsibility is to ensure that you as a client have the correct product in your portfolio, making sure that it adds value, deliver as expected and satisfy the need you once had.

I work in partnership with you as my client to achieve the expected results, thus I am a firm believer of continuous reviews with my partners.

Why should you speak to me?

My approach and experience within the financial services sets me apart from my peers within the industry. I believe that each client deserves the best level of service all the time and I have been developing this service experience within my team.

I am service orientated and client centric with a very strong focus on: urgency, accuracy, competency, effective communication and empathy. You will experience the best possible service all the time and the correct solutions which stems from our world class pool of services, products and platforms.

I built my relationships on trust which is the hardest commodity to win.

Who are my clients?

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

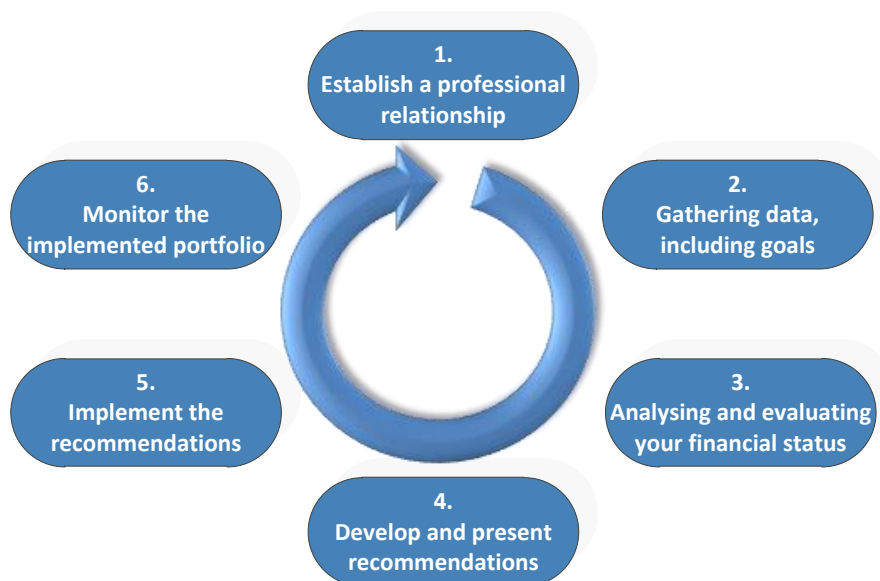
- ⌕ Buy & Sell Solutions
- ⌕ Key Person Insurance
- ⌕ Contingency plans

Retirement Fund Benefits

- ⌕ Financial planning advice to fund members
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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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