

Financial Planning Client Value Proposition



Chriswill September

Sanlam Financial Adviser

Boland Unit

As a Sanlam financial adviser, I strive to be the most professional and client-centric financial adviser in the region who treats clients fairly whilst doing business in a profitable and sustainable way.

How am I qualified as a professional financial planner?

- ⤵ Regulatory Exam 1
- ⤵ Bcom (Hons) in Entrepreneurship and Marketing
- ⤵ Postgraduate Diploma in Management with Business Administration

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.

Who are my clients?

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

- ⤵ Professional
- ⤵ Graduates
- ⤵ Small business owners
- ⤵ Young people embarking on their careers
- ⤵ Retirees
- ⤵ People close to retirement

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
- Cumulus Eco Retirement Plan
- 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
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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.

For more information, contact me @:

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