

Financial Planning Client Value Proposition



Cobie Beukes

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

How am I qualified as a professional financial planner?

- ⤵ Regulatory Exam 5
- ⤵ ND: BusMan; B.Tech (Public Mgt)[CPUT]

Member of Financial Planning Institute

- ⤵ RFP™ professional (Registered Financial Planner™ professional)

What do I offer my clients?

My commitment to you

As your professional Financial Planner, I provide ongoing financial advice and services backed by Sanlam. My advice is objective, balanced and delivered with the same care and standard I would expect to receive in your position. I will keep you informed about relevant and material matters relating to your agreed financial plan. I believe in building life-long relationships which could span across generations within family structures.

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 (including estate planning).

I am also GEPP accredited and treat every Client with Integrity, Honesty, Professionalism and Loyalty.

Who are my clients?

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

- ⤵ Government Employees (GEPP)
- ⤵ Retirees, People close to retirement
- ⤵ Professionals, Graduates Retirees
- ⤵ Business owners, executives and SME's
- ⤵ Concerned husbands, wives and parents
- ⤵ Young people embarking on their careers

Holistic financial planning services offered

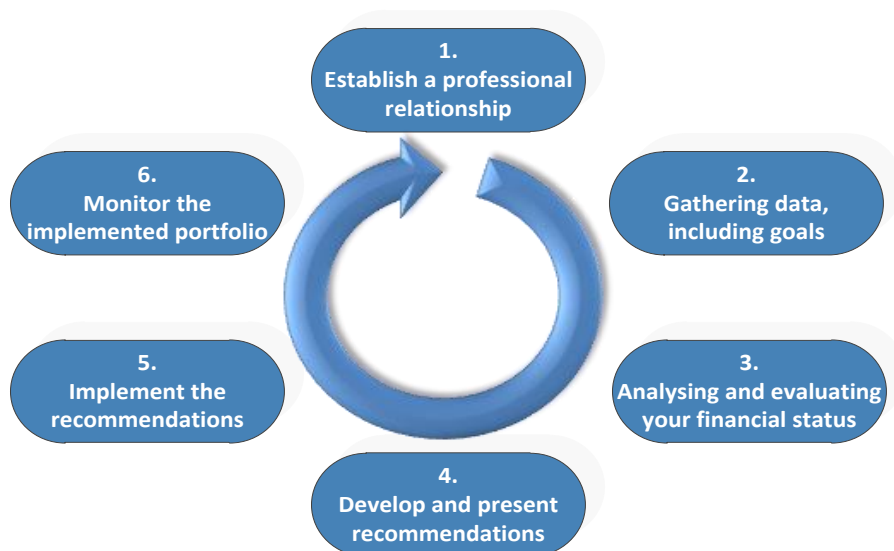
As an authorised representative of Sanlam, I am proud to offer products that are competitive, transparent, tailor-made for your needs and excellent value for money.

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

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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