

Cuten Williams
Client Value Proposition (CVP)

PROFESSIONAL EXPERIENCE

I am a professional with specialised knowledge and skills in the financial services industry. I am a Qualified Wealth Manager with all Qualifications with regards to FISCA Qualification criteria. As my client, you can always rely on service that is:

- Researched
- Transparent
- Confidential
- Specialised.

When you implement my recommendations, I will:

- ensure that all implementation requirements are met with limited impact on your schedule
- provide you with a simplified and up-to-date portfolio of all your provisions

During your relationship with me, you can rely on me to aid regarding:

- the placement of funds or policies
- regular portfolio updates and feedback
- reliable and friendly service.

MY SERVICE OFFER

This service offer serves as a symbol of commitment for all parties – that your financial plan will be proactively pursued and implemented as required. I will ensure that financial education and wealth creation is at the peak of all our goals.

Initial contact

I will arrange a suitable time for an interview with you.

Fact finding

I will:

- meet you and introduce myself
- conduct a fact-finding interview and collect all the relevant data.

Data analysis

Based on the data collected, I will identify all the issues relevant to your situation.

I will:

- assess and analyse each issue
- formulate strategies to achieve your present needs
- review all available options in order to realise your future goals.

Recommendations

I will:

- describe your current financial position
- provide an analysis of your needs and goals
- provide product recommendations to meet your needs and goals

Implementation

I will:

- prepare my written recommendations
- confirm the presentation date with you
- formally present my written recommendations
- discuss issues and queries you may have in order to ensure that you are fully comfortable with my recommendations
- obtain your consent to proceed with the implementation of my recommendations
- complete all the necessary documentation, with your signatures and approvals

Review

arrange a review date with you, prepare for and conduct your financial review.



For more information, contact my office at:

Tel: 051 407 80094

Mobile: +27712883330

