



## Dircolene Naude

National Certificate: Wealth Management

T +27 58 303 6545

C +27 83 408 2677

F +27 86 652 9254

[dircolene@sanlamafp.co.za](mailto:dircolene@sanlamafp.co.za)

Dircolene is registered Financial Planner with Sanlam Aligned Financial Planning. She has over 8 years' experience in the advice and intermediary services industry.

## Services offered

Dircolene is authorized to provide advice in the following categories:

- Business Insurance
- Retirement Planning
- Estate Planning
- Investment and Wealth Solutions
- Risk Cover

## ➤ Advice Philosophy

I believe that the purpose of financial planning is to facilitate (create or maintain) a lifestyle and it extends for an entire lifespan.

To achieve this, it must be robust, adaptable and focused directly on what you want out of your life.

Sanlam's financial planning model incorporates six steps – An initial meeting, identifying your goals, assessing your financial situation, preparing a financial plan, implementation, and reviews. These steps allow us to help you identify and prioritize your financial goals and develop a sustainable plan to achieve them.

## ➤ My Promise to You

I aspire to offer an experience to all my clients that provides you with the most value. To make this possible I equip myself with the necessary knowledge to ensure that your financial plan is relevant, accurate and executable. I believe in treating all my clients fairly to ensure that regardless of what may happen, you and your loved ones will achieve economic freedom.

You, the client are the cornerstone of my practice and I will continually strive to meet your needs and exceed your expectations.