

Financial Planning Client Value Proposition



Jezreel Bartes
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
- ⤵ Financial Planning and Budgeting

How am I qualified as a professional financial planner?

- ⤵ Regulatory Exam 5
- ⤵ Product specific training and courses
- ⤵ Tertiary education

What do I offer my clients?

Personalised Financial Needs Analysis

I provide a structured, comprehensive assessment of your financial position. This includes identifying gaps in protection, investment, and retirement planning, and offering clear, actionable recommendations aligned with South African regulations.

Insurance Planning & Risk Protection

I help you secure the right cover for life's uncertainties. This includes life insurance, disability cover, income protection, and severe illness benefits. Every recommendation is tailored to your needs, fully compliant, and explained in simple, transparent language.

Investment Strategy & Wealth Growth

I guide you in building long-term wealth through goal-based investment planning. You'll receive clarity on risk, returns, asset allocation, and the most suitable investment vehicles for your financial goals.

Retirement Planning

I help you plan for a dignified, financially secure retirement. This includes retirement annuities, preservation funds, pension optimisation, and tax-efficient contribution strategies. You'll understand exactly what you need to retire with confidence.

Compliance-Driven, Ethical Advice

Every recommendation is rooted in transparency, ethics, and FSCA-aligned processes. You'll always know why a product is recommended, how it works, and how it protects your financial future.

Financial Education & Empowerment

I believe informed clients make better decisions. I provide clear explanations, scenario modelling, and ongoing support to help you understand your money and take control of your financial journey.

Ongoing Support & Policy Optimisation

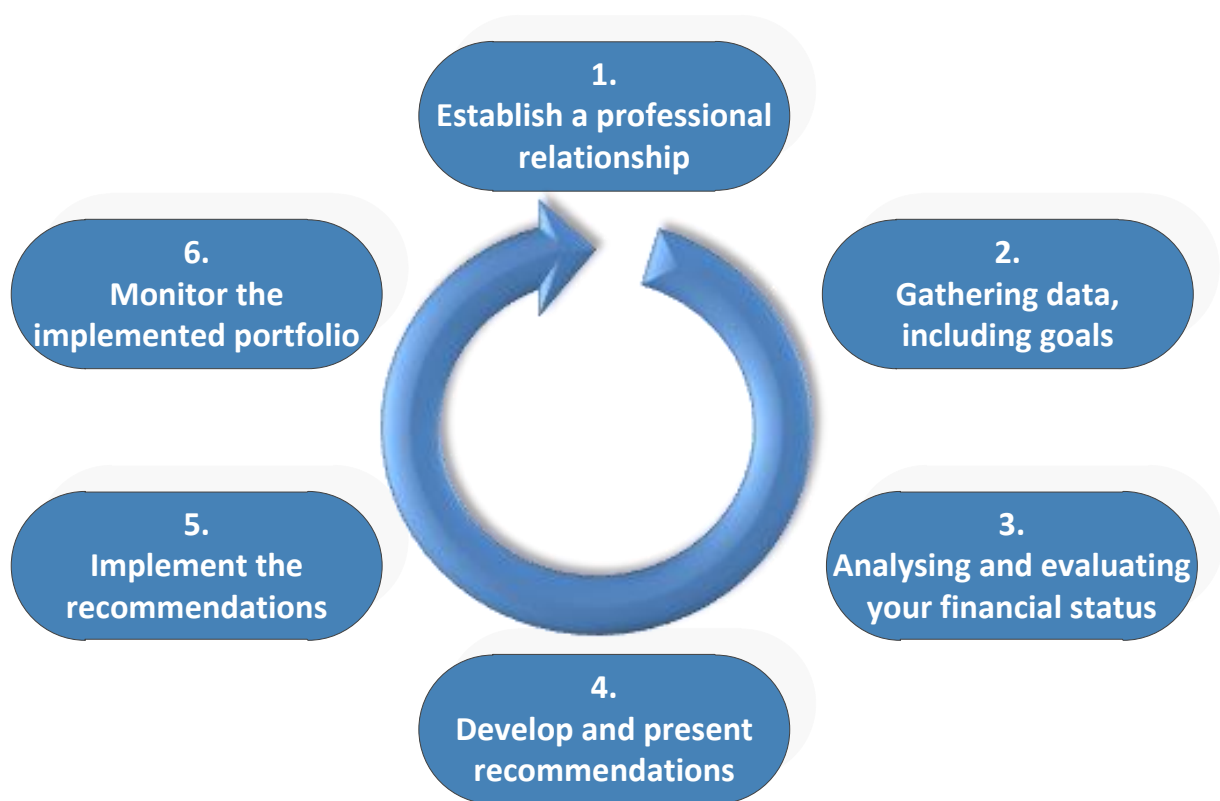
Your financial plan evolves as your life does. I offer regular reviews, policy updates, and proactive guidance to ensure your cover and investments remain aligned with your goals.

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.

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

Office number: << 061 034 4130 >> Email: << Jezreel.bartes@sanlam4u.co.za >>
Mobile number: << 061 034 4130 >>