Financial Planning Client Value Proposition

Jody Smith

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
- Short-term insurance products

How am I qualified as a professional financial planner?

- Regulatory Exam 5
- National Certificate in Wealth Management
- *BA Information Management*

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

- Professional
- Graduates
- Business owners, executives and SME's
- Concerned husbands, wives and parents
- Young people embarking on their careers
- Retirees

- People close to retirement

Holistic financial planning services offered

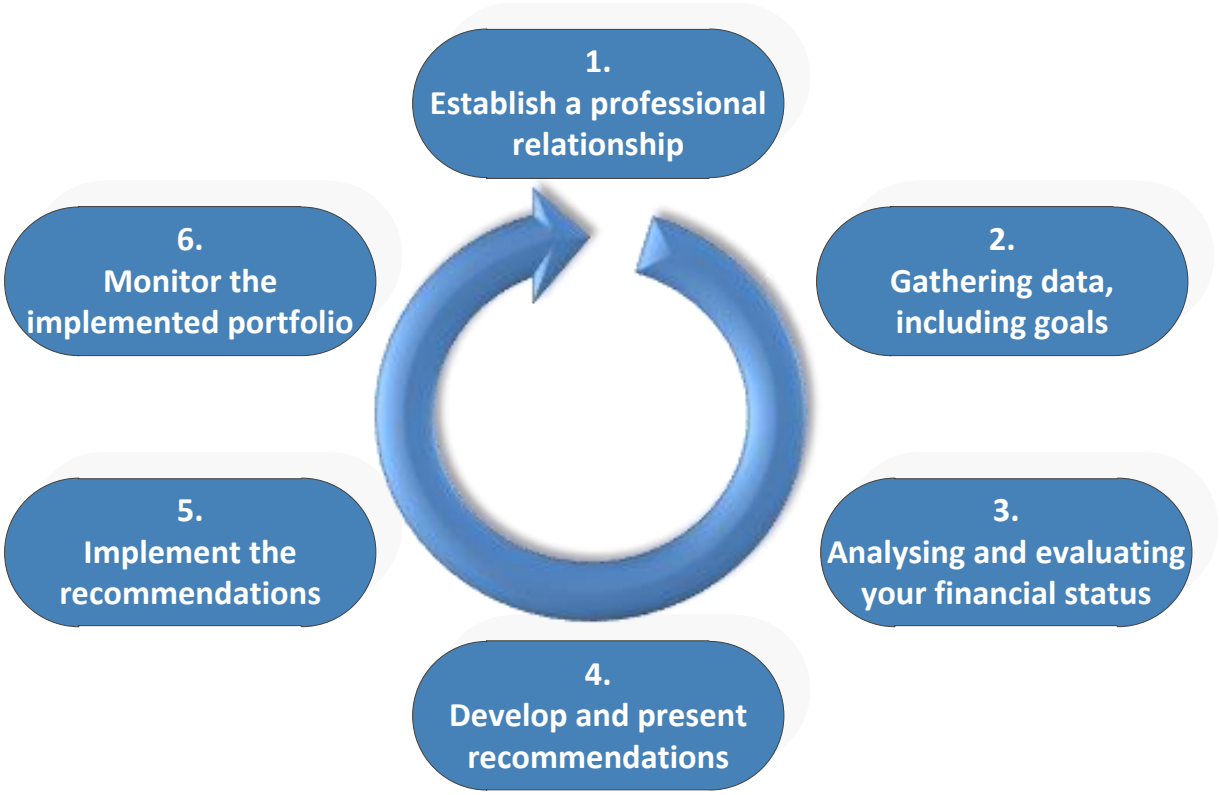
As an authorised representative of Sanlam I am proud to offer products that are competitive, transparent, tailor-made for your needs and excellent value for money.

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
	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
Short-term Insurance	Personal Lines
	Commercial Lines
Retirement Fund Benefits	Financial planning advice to fund members
Tax Planning	Income Tax Practitioner

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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