



FINANCIAL PLANNING CLIENT VALUE PROPOSITION

Liesel Du Plooy

SENIOR SANLAM FINANCIAL ADVISER & INVESTMENT SPECIALIST

Financial security, wealth creation & financial portfolio planning are my passions. The need for proper financial planning provided me the opportunity to assist many of my clients to become more secure and steadfast on their journey to become more financially independent. Detailed risk planning and analysis equips my clients with peace of mind in their daily activities.

With over 10 years industry experience and knowledge you can be sure of the best advice and planning to suite your personal circumstance by design.

HOW AM I QUALIFIED AS A PROFESSIONAL FINANCIAL PLANNER?

- Post Graduate in Law of Financial Planning (NQF 8)
- 1st Level Regulatory Exam for Representatives (RE5)

INTERNATIONAL QUALITY AWARDS:

- Qty: 4

AUTHORISED BY SANLAM LIFE TO ADVISE ON:

- Long-term insurance products
- Retirement annuities and Preservation funds
- Collective investment schemes

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 and service your portfolio on an annual basis.

WHY SHOULD YOU SPEAK TO ME?

You will enjoy a long-lasting professional partnership with me as we work together towards achieving your personal financial goals and addressing your personal financial needs.

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
- Farmers
- 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 our comprehensive products that are competitive, transparent, tailor-made for your personal 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 and Immediate expenses

PLANNING FOR RETIREMENT AND AT RETRENCHMENT

- Retirement Annuities
- Preservation Funds
- Risk Conversion Options

POST-RETIREMENT PLANNING

- Guaranteed Annuities
- Living Annuities

INVESTMENT PLANNING

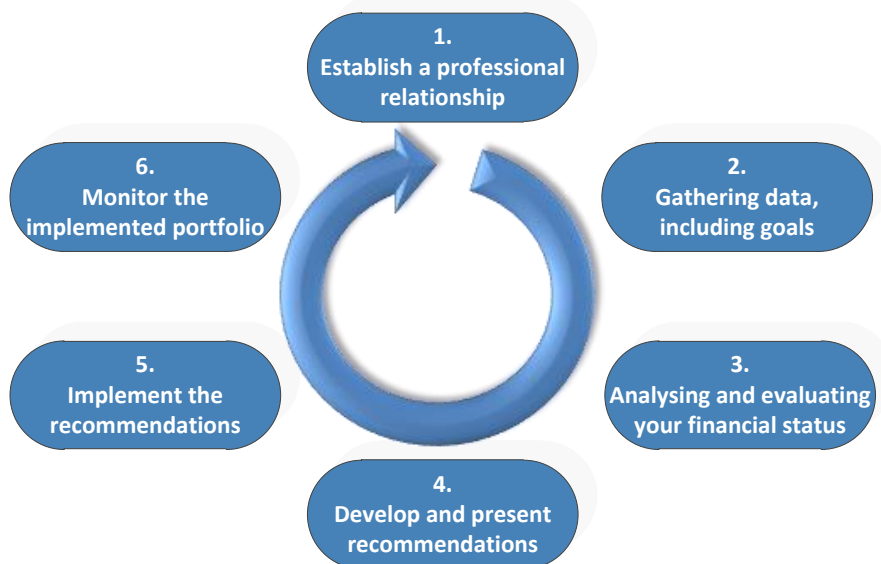
- Tax-free Savings Accounts
- Endowments
- Collective Investment Schemes
- Linked Investments through Glacier by Sanlam
- Structured Solutions with Guarantees

ESTATE PLANNING

- Wills
- Trusts

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:

Cellphone number: 083 488 2726
Email address: lieselduplooy@sanlam4u.co.za
Website: <https://www.sanlamadvice.co.za/adviser/lieselduplooy/>
Facebook page: <https://www.facebook.com/LieselduplooySFA>
Linkedin page: <https://www.linkedin.com/in/liesel-du-plooy-a6660240/>

*Please feel free to read my referrals on **Linkedin**.*

It's now even easier to make contact and **work with your Sanlam Financial Planner**

sanlamadvice.co.za/adviser/lieselduplooy



SCAN ME

