

Lungile Nqetho
Financial Advisor
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Client Value Proposition

At **Sanlam**, we strive to help our **clients** achieve **extraordinary success** in their financial portfolios and their life dreams. As a Sanlam Financial Advisor, I strive toward this goal by assisting you, as one of our **valued clients**, to achieve your goals through an **in-depth and accurate** financial needs analysis. **Through this process**, we help you create wealth and **preserve** it. financial portfolios and their life dreams. All of our advisors at Goliath strive toward this goal. We assist you, as one of our **valued clients**, to achieve your goals through an **in-depth and accurate** financial needs analysis. **Through this process**, we help you create wealth and **preserve** it

Confidentiality Agreement

We will treat all information given to me by you (the client) as strictly confidential. I will only disclose information to which parties you (the Client) give me consent to do so, or if I'm legally obligated to do so disclose information.4

My Service Level Agreement

As one of our valued clients, we commit ourselves to:

- Working with you in order to determine areas for development within your financial situation.
- Implement a number of practical initiatives to drive your finances successfully into the future

This Service Level Agreement acts as a symbol of commitment for all parties to assure that your Financial Plan will be proactively pursued and implemented as decided upon.

How are we going to achieve it:

- Gather information from you (the client).
- Establishing your goals and needs.
- Analysing the data.
- Present the financial plan.
- Implement the financial plan.
- Monthly Newsletters via E-mail.
- Quarterly phone calls.
- Reviewing your portfolio on a yearly basis.

Our services to you.

- Risk planning (life insurance /disability /trauma).
- Retirement Planning.
- Investment Planning.
- Estate planning (Will).
- Short term insurance.
- Accounting & Tax (Referral basis)
- Employee benefits

What do I need from you:

- To be honest and truthful about your current financial situation.
 - Willing to give me a recent payslip.
 - To give me at least one Appointment per year, to review the financial portfolio.
- To update me with your life changing events. Example. Marriage, Pregnancy, Contact Details etc.
- Let me know if any Other Financial Advisor contacts you.

Date:.....

Sign:

Sign:

Client Name :

Lungile Nqetho

