

Financial Planning Client Value Proposition



<<Mandy Naidoo>>

Sanlam Senior Financial Advisor

My name is Mandy, and I am a Senior Financial Advisor at Sanlam Head Office. Since beginning my career on 1 March 2008, I have had the privilege of working with individuals across diverse races, genders, and professional sectors. What drives me most is the opportunity to build lasting relationships and provide financial guidance that truly supports people's unique journeys.

Beyond my professional role, I deeply value family traditions and the connections that shape our lives. As a mother of four and grandmother of nine, I understand the importance of planning not only for financial security but also for the legacy we leave behind. This perspective allows me to connect with clients on a personal level, ensuring that financial strategies align with both professional goals and family aspirations.

I would love the opportunity to connect with you and explore how I can support your financial planning needs. Whether it's wealth management, retirement planning, or safeguarding your family's future, my goal is to provide tailored solutions that bring peace of mind and long-term stability.

Authorised by Sanlam Life to advise on:

- Investments
- Retirement
- Financial Planning
- Medical Aid

How am I qualified as a professional financial planner?

- Regulatory Exam 5

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.

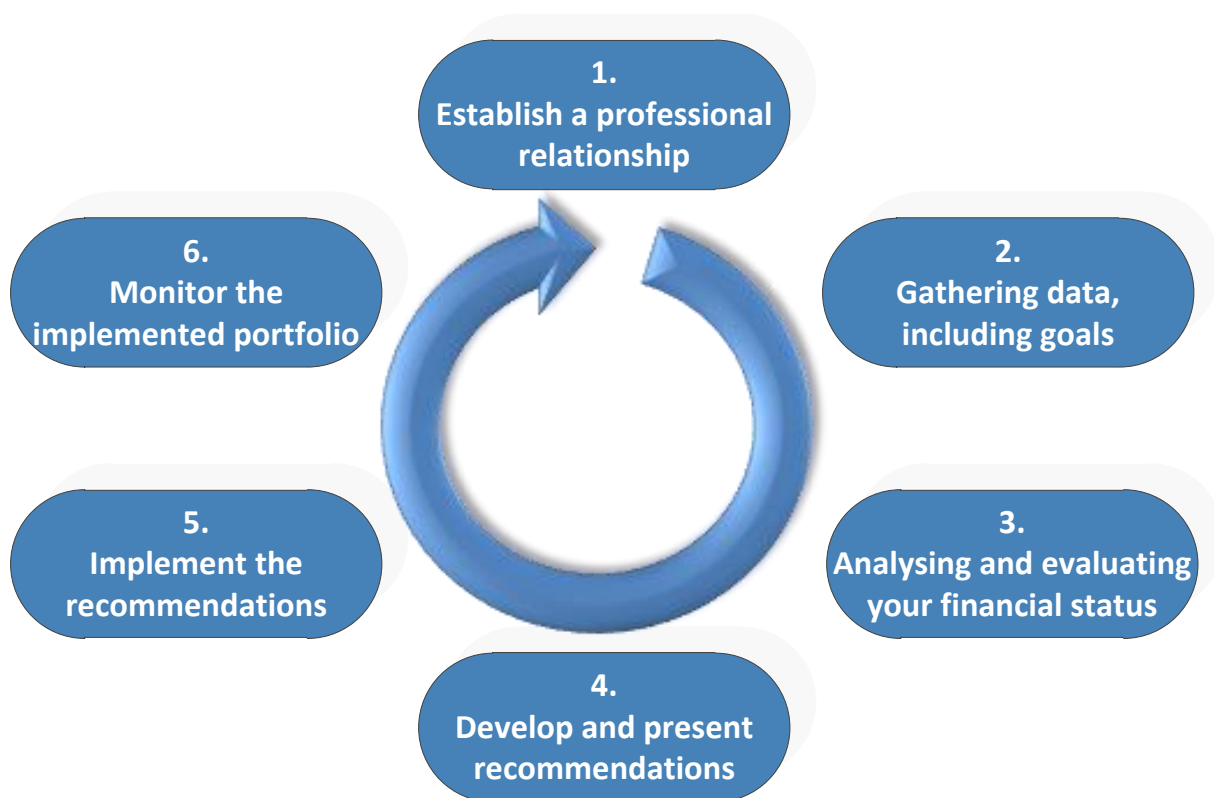
I will keep you informed continually about matters relevant and material to you, in respect of your financial plan as we have agreed on.

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.

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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