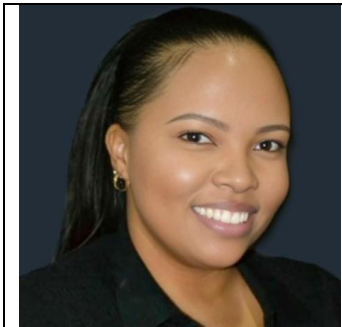


Financial Planning Client Value Proposition



Neo Mabe
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

How am I qualified as a professional financial planner?

- ⌕ Higher Certificate in Account Science

What do I offer my clients?

As a professional financial planner, I am committed to delivering expert, ongoing financial guidance and services supported by Sanlam.

I will offer you unbiased and thorough financial advice, ensuring the same level of care and attention that I would expect for myself in a similar situation.

You can count on me to keep you regularly updated on all important and relevant matters related to your financial plan, as we have discussed.

Why should you speak to me?

You can look forward to a lasting professional relationship as we collaborate to achieve your financial goals.

Who are my clients?

My clients are committed individuals who seek financial security and are dedicated to achieving financial independence. My clients include:

- ⌕ Professional and Professional Athletes
- ⌕ 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 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

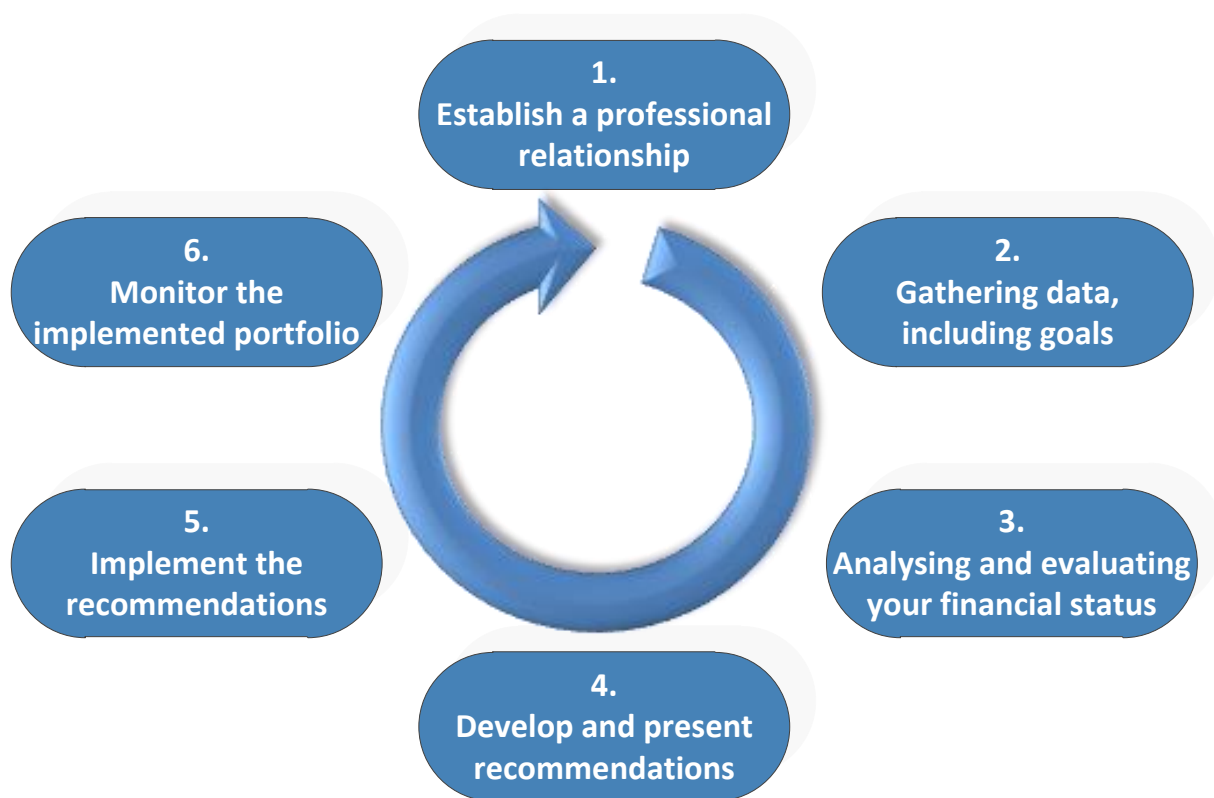
- ⤵ Personal Lines
- ⤵ Commercial Lines

Retirement Fund Benefits

- ⤵ Financial planning advice to fund members
 - ⤵
-

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

Mobile number: 061 947 9354

Email: <<neo.mabe@sanlam4u.co.za>>