

Financial Planning Client Value Proposition



Nico Du Plooy

Financial Planner

Sanlam Life (Gauteng South)

What do I offer my clients?

As a Financial Planner backed by Sanlam, I help individuals and families bring structure, clarity, and purpose to their financial lives.

My approach is practical, personal, and relationship-driven. I believe financial planning should not feel overwhelming or overly complicated. Instead, it should help you better understand where you are, where you want to go, and what steps are needed to move forward with confidence.

I aim to build long-term relationships with my clients by providing ongoing guidance, honest conversations, and solutions tailored to their unique goals, responsibilities, and stage of life.

Whether you are starting your career, building a family, growing wealth, protecting what matters most, or preparing for retirement, my goal is to help you make financial decisions with greater clarity and peace of mind.

Why should you speak to me?

Before financial planning, I spent years coaching people in health and fitness through Everyday Hero Fitness Centre. During that time, I realised that many of the same challenges people face physically also exist financially. People are often working hard and doing their best, yet still feel uncertain, stuck, or unsure whether they are truly progressing.

That realisation is what led me into financial planning.

I believe financial health, much like physical health, is built through consistency, discipline, long-term thinking, and having the right plan in place.

As both a coach and competitive Olympic weightlifter, I understand the value of preparation, resilience, and showing up consistently over time. These principles shape the way I work with clients and the relationships I aim to build.

At the end of the day, financial planning is not just about products or numbers. It is about helping people build a life that works and creating confidence in the future they are working towards.

Who are my clients?

I work with driven individuals and families who want more structure, clarity, and confidence in their financial lives.

Many of my clients are:

- ⊗ Young professionals starting their careers
- ⊗ Business owners and self-employed individuals
- ⊗ Young families wanting to protect what matters most
- ⊗ Individuals wanting to start investing and building long-term wealth
- ⊗ Concerned husbands, wives and parents
- ⊗ People who feel overwhelmed or uncertain about their financial direction
- ⊗ Individuals who value discipline, growth, and long-term thinking

Holistic financial planning services offered

I also naturally connect with people involved in sport, fitness, and performance-driven environments, where consistency, preparation, and long-term planning are already part of their mindset.

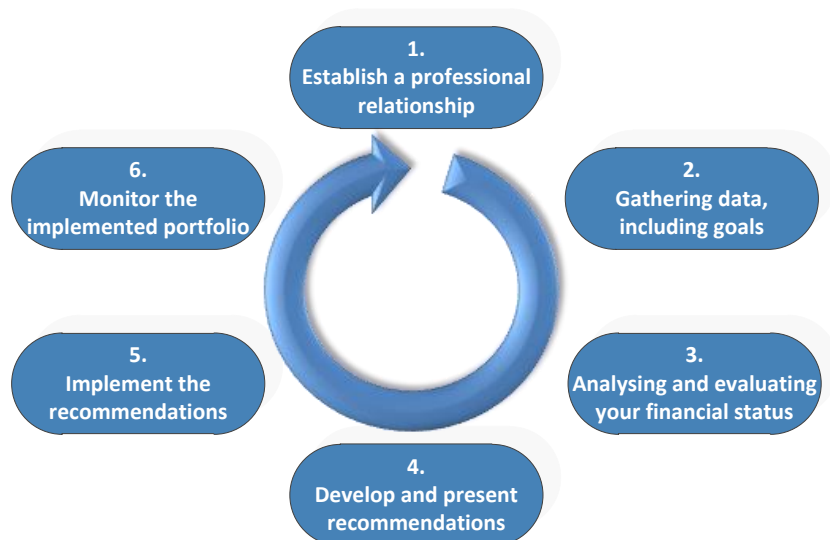
Depending on your goals and stage of life, this may include:

- Protecting your income and family against unexpected events
- Building long-term wealth through disciplined investing
- Creating tax-efficient savings strategies
- Planning for retirement early and intentionally
- Structuring solutions for business owners and self-employed individuals
- Helping young professionals establish healthy financial habits from the start
- Reviewing existing cover and investments to ensure they still align with your goals
- Creating financial structure and clarity during major life transitions

The goal is always the same: helping you move forward with greater confidence, clarity, and peace of mind.

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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