

Financial Planning Client Value Proposition



Nolwazi Wendy Ntanzu

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
- ⌚ Short-term insurance products

How am I qualified as a professional financial planner?

- ⌚ Regulatory Exam 1
- ⌚ Regulatory Exam 5
- ⌚ *Diploma In Law*
- ⌚

Member of Financial Planning Institute

- ⌚ RFP™ professional (Registered Financial Planner™ professional)
- ⌚ AFP™ professional (Associate Financial Planner™ professional)
- ⌚ FSA™ professional (Financial Services Advisor™ professional)
- ⌚ CFP® professional (CERTIFIED FINANCIAL PLANNER® Professional)

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.

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 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 Retirement



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 
Short-term Insurance 
Retirement Fund Benefits 
Tax Planning 

Buy & Sell Solutions
Key Person Insurance
Contingency plans
Personal Lines
Commercial Lines

Financial planning advice to fund members

Income Tax Practitioner

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

Office <
number:03590732
09

Email:
nonlwazi.
ntanzi@s <
anlam4u.c
o.za

Mobile number: 0813467544 <