

Financial Planning Client Value Proposition



Preashni Kathy Naidoo
Sanlam Financial Adviser
Professional Financial Solutions

As a Sanlam Financial Adviser and being a part of an organization that is a leader in the industry, I have a customer centric approach, and my aim is to always provide my clients with excellent advice and service.

Authorised by Sanlam Life to advise on:

- ⌚ Long-term insurance products
- ⌚ Retirement annuities
- ⌚ Financial Planning
- ⌚ Collective investment scheme
- ⌚ Estate Planning
- ⌚ Sanlam Reality

How am I qualified as a professional financial planner?

- ⌚ Regulatory Exam RE5
- ⌚ National Diploma in Marketing

Member of Financial Planning Institute

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?

I am customer centric and passionate about changing people's lives. I provide my clients and their families with excellent service and advice and continue to do so on an on-going basis. I have been in the Insurance industry for over 10 years and bring about a wealth of knowledge and skill through my experience. You have my 100% commitment to you as a client in terms of specialized, confidential and transparent services. My expertise lies in understanding my clients needs and ensuring that the best solution is put into place.

Who are my clients?

My clients are responsible individuals that want to achieve financial security and strive towards financial independence. My clients include:

- ⤵ Professionals
 - ⤵ Graduates
 - ⤵ Business owners, executives and SME's
 - ⤵ Concerned husbands, wives and parents
 - ⤵ Young people embarking on their careers
 - ⤵ Retirees
 - ⤵ People close to retirement
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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

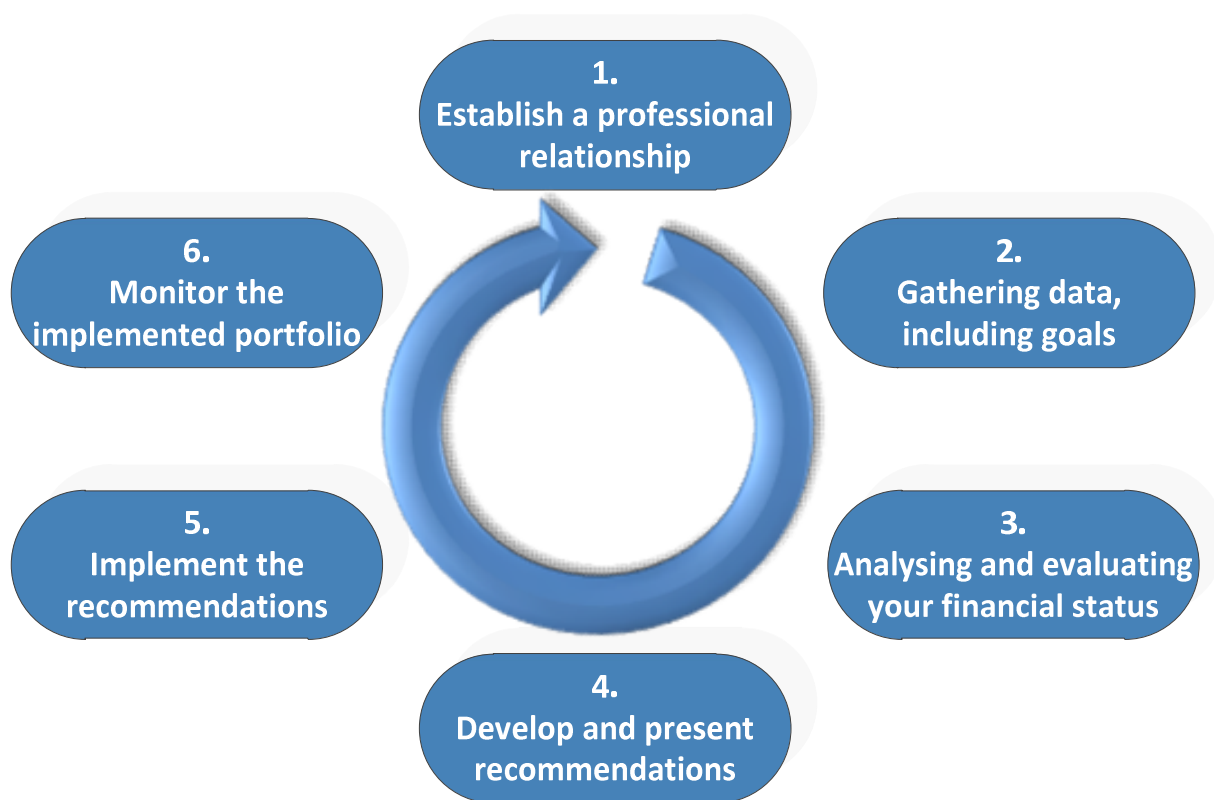
Tax Planning

- ⤵ 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

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Fax: Not Applicable