



Sanlam's Financial Wellness programme



Dear: Client

I Sbonelo Mbalane represent Sanlam and together with my team we are providing free Financial Literacy and Education Programs as part of our Social Responsibility Program. We have agreements with various government departments, where we act as the Financial Literacy and Education Partner. We are eager to develop our relationship with the You and loved ones to include you in our free Financial Literacy and Education Programs. We know that you are the best person to speak to about setting up this program.

Please note that this is NOT a sales presentation. It is purely an education program

Our programs provide tailored solutions to both organisational and personal needs. Your employee wellness programs will be bolstered with the inclusion of our Financial Literacy and Education Program. You will gain access to qualified Subject Matter Experts with experience in Tax, Risk Analysis, Estate Planning and Investment Planning. You will be empowered to take control of their finances by making informed financial decisions.

Our programme consists of a series of short, simple financial workshops and covers the topics below.

1. How financially fit are you?
2. Budgeting and managing debt
3. Understanding risk cover
4. Retirement and savings
5. Wills and tax planning

Of which we would sponsor a breakfast session and information material per workshop.

I am based in Newcastle however we do work throughout the Northern KZN region and are equipped to present at both departmental offices and facilities. I look forward to discussing how we can establish this invaluable program in your organisation with you.

Kind Regards

Sbonelo Mbalane
Financial Advisor
Sbonelo.Mbalane@sanlam4u.co.za
0677968142
0723009994