

## Financial Planning Client Value Proposition



*Wayne Parsons*

Sanlam Financial Planner

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
- ⌕ Investments

### How am I qualified as a professional financial planner?

- ⌕ Matric (Grade 12)
- ⌕ Class of business
- ⌕ GEPP - Government employee pension fund
- ⌕ Investment generalist – (IPF) Investment planning fundamentals

### Member of Financial Planning Institute

- ⌕ RE5 Representative
- ⌕
- ⌕
- ⌕

### 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.

You will enjoy the most cost effective solutions as we work together towards achieving your financial goals.

You will enjoy my availability even on weekends and public holidays, by appointment.

### **Client testimonials:**

*" You were extremely educating, like I mentioned at the beginning I really didn't know or understand what a Life Insurance cover is nor what it's for and now I'm confident that my son's financial needs will be secured should anything happen to me. You knew what I needed when I didn't know and provided a service most accommodative of those needs - which is what convinced me in committing to your company."*

*" You portrayed characteristic of someone that has knowledge and understanding of their line of work. Patience and also understanding that the next person might not have a clue of the products your company has to offer, so you really took your time to help me understand and not just rush me into making a decision."*

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### **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
  - ⤵ Government employees
  - ⤵ 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**

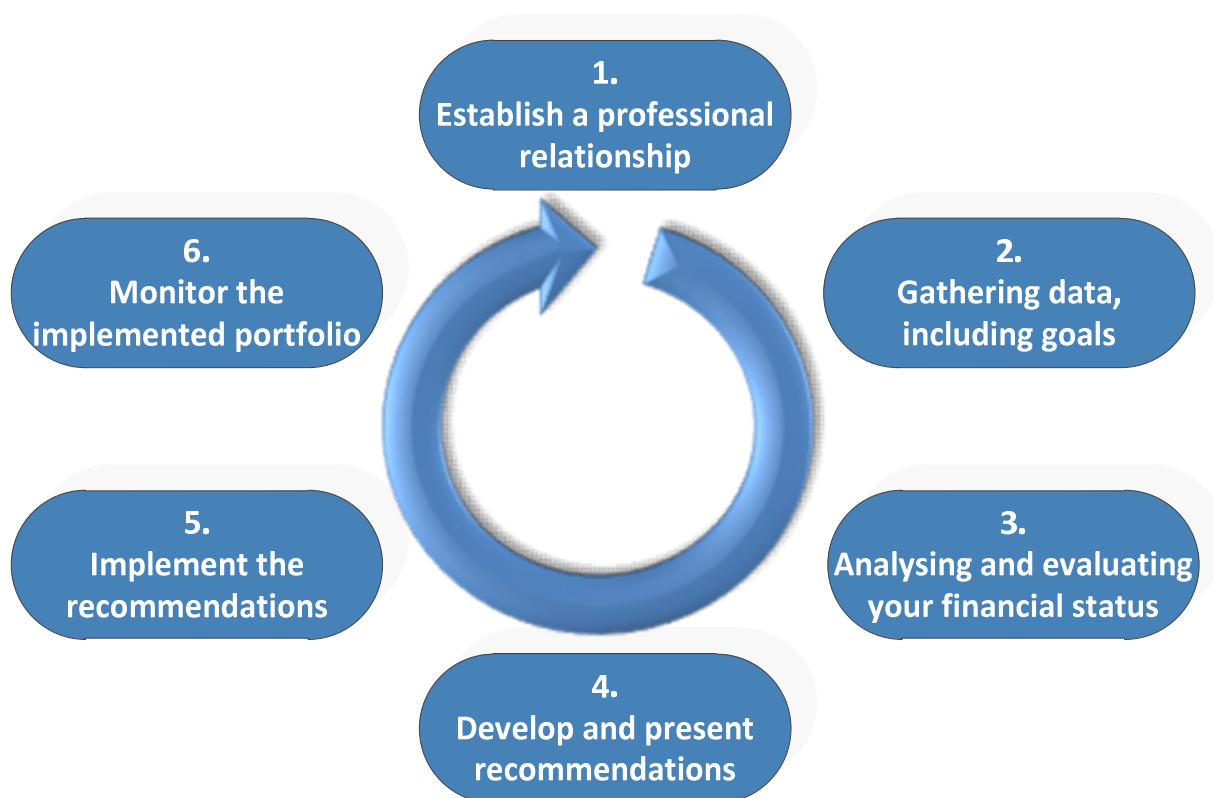
- ⤵ Tax-free Savings Accounts
- ⤵ Endowments
- ⤵ Collective Investment Schemes

|                                 |                                                                                                                                              |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
|                                 | <ul style="list-style-type: none"> <li>Linked Investments through Glacier by Sanlam</li> <li>Structured Solutions with Guarantees</li> </ul> |
| <b>Estate Planning</b>          | <ul style="list-style-type: none"> <li>Wills</li> <li>Trusts</li> </ul>                                                                      |
| <b>Business Assurance</b>       | <ul style="list-style-type: none"> <li>Buy &amp; Sell Solutions</li> <li>Key Person Insurance</li> <li>Contingency plans</li> </ul>          |
| <b>Short-term Insurance</b>     | <ul style="list-style-type: none"> <li></li> <li></li> </ul>                                                                                 |
| <b>Retirement Fund Benefits</b> | <ul style="list-style-type: none"> <li>Financial planning advice to fund members</li> </ul>                                                  |
| <b>Tax Planning</b>             | <ul style="list-style-type: none"> <li>Income Tax Practitioner</li> </ul>                                                                    |

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## Financial planning process

My financial planning process is based on the six steps used by professional financial planners world-wide



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### 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.

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### For more information, contact me at

Office number: <<tel number>>

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