



authorised by  **Sanlam**

Get the financial advice you need

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Get the financial advice you need with **Concept Woodhill**

We're committed to helping you reach your financial goals – whether you're planning for retirement, saving for a holiday, securing your child's future, or building your business.

Consulting an accredited financial adviser is essential to help you with some of the most

important financial decisions of your life – and at **Concept Woodhill**, we offer you holistic advice to help you reach your financial goals, achieve sustainable wealth and gain peace of mind.



A range of **financial expertise** under one roof

At Concept Woodhill, you'll draw on the expertise of a team of financial specialists who can offer you personalised advice and a wide range of financial solutions – from financial planning and insurance to investment advice

and retirement planning. We also offer short-term insurance with our partners MiWay and Santam. And if any of your financial needs can't be addressed by one of our advisers, we'll source an expert for you.

Continuity and **peace of mind**

As a Concept Woodhill client, you'll be building a relationship with our team of financial advisers, rather than with a single adviser. And this means that you'll always deal with someone who understands your financial situation and goals and knows your long-term financial plan. This continuity, along with the knowledge that the financial advice we provide is backed by Sanlam, means you can rest assured that your finances are always in good hands.

Our **commitment** to you

Our team of financial planner's main focus is building a trust relationship with our client's. We aim to provide our clients with comprehensive estate planning, that includes Tax planning, Retirement, and Investment Solutions etc.

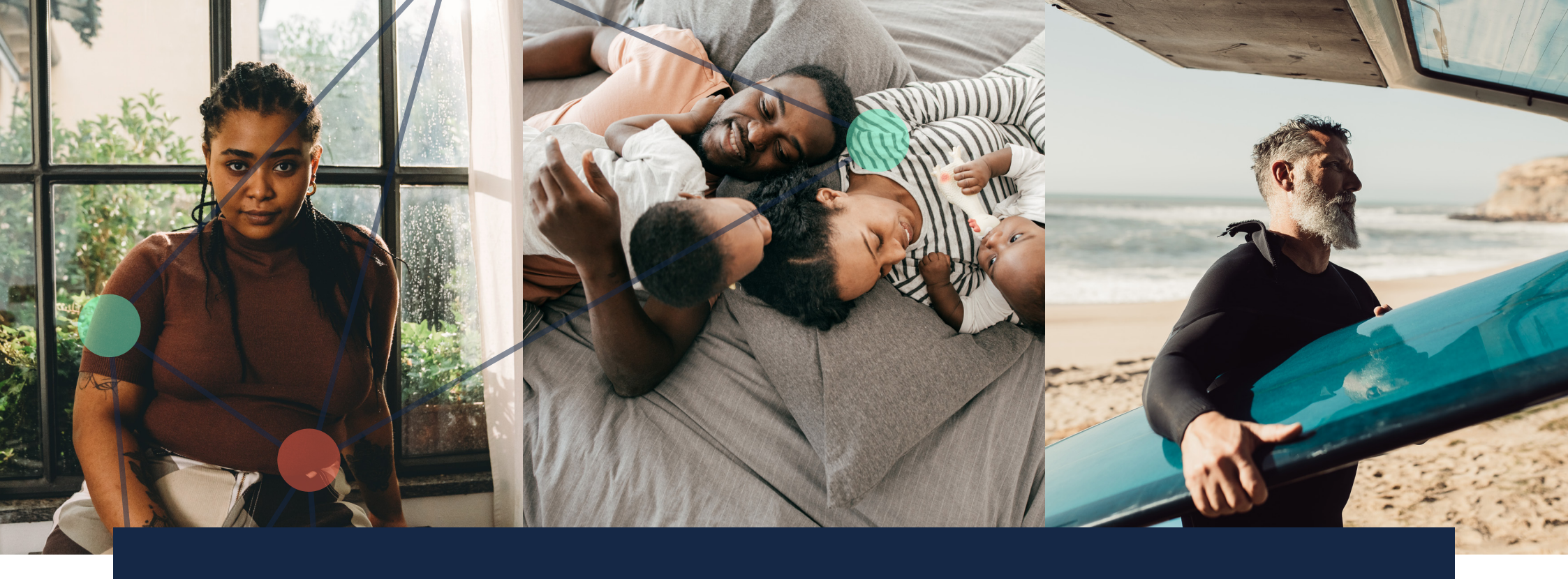
We provide out of the box Financial Ideas that is suitable to each client's individual needs.

We keep ourselves educated constantly to ensure that we can provide the best advice for our clients, and to ensure that we can provide to best possible return on Investments according to the changing Economic environments.

Our Senior Advisor, Monti Coetzer, has been a Top 15 Advisor for Sanlam for the past 15 years.

We have an experienced administrative team, to ensure that the level of service provided to our clients is a top priority.





Products and Services:

We offer a comprehensive range of products and services to help you manage your risk.

Insurance

Personal:

- Life Cover
- Disability Cover
- Severe Illness Cover
- Impairment Cover
- Accident Cover
- Income Protection

- Sickness Benefit
- Funeral Cover

Business:

- Key Person
- Buy and Sell
- Contingent liability

Retirement

- Retirement Annuities
- Pension Funds
- Provident Funds
- Preservation Funds
- Living Annuities

Investments

- Tax-free investments
- Unit Trusts
- Various options on LISP (Linked Investments)
- ILLAs / ILLIs
- Endowments
- Preservation funds
- International / Offshore options
- Life Annuities
- Term Annuities
- Saving plans
- Short/Long term Investments
- Diversified investments – Glacier by Sanlam
- Collective Investments



Employee Benefits

- Retirement funding

Estate Planning

- Wills
- Trusts
- Guardian Trusts
- Beneficiary Fund
- Estate Administration

Loyalty Program

- Reality

In association with our partners we can offer:

- Accounting and Tax Services
- Legal Advice





Meet the team

Monti Coetzer
Principal / Senior Adviser
4 Year Bach Degree

Jared Swanepoel
Adviser
Honours Degree in Business
Management

Jaydon Coetzer
Broker
Honours Degree in Supply
Chain Management

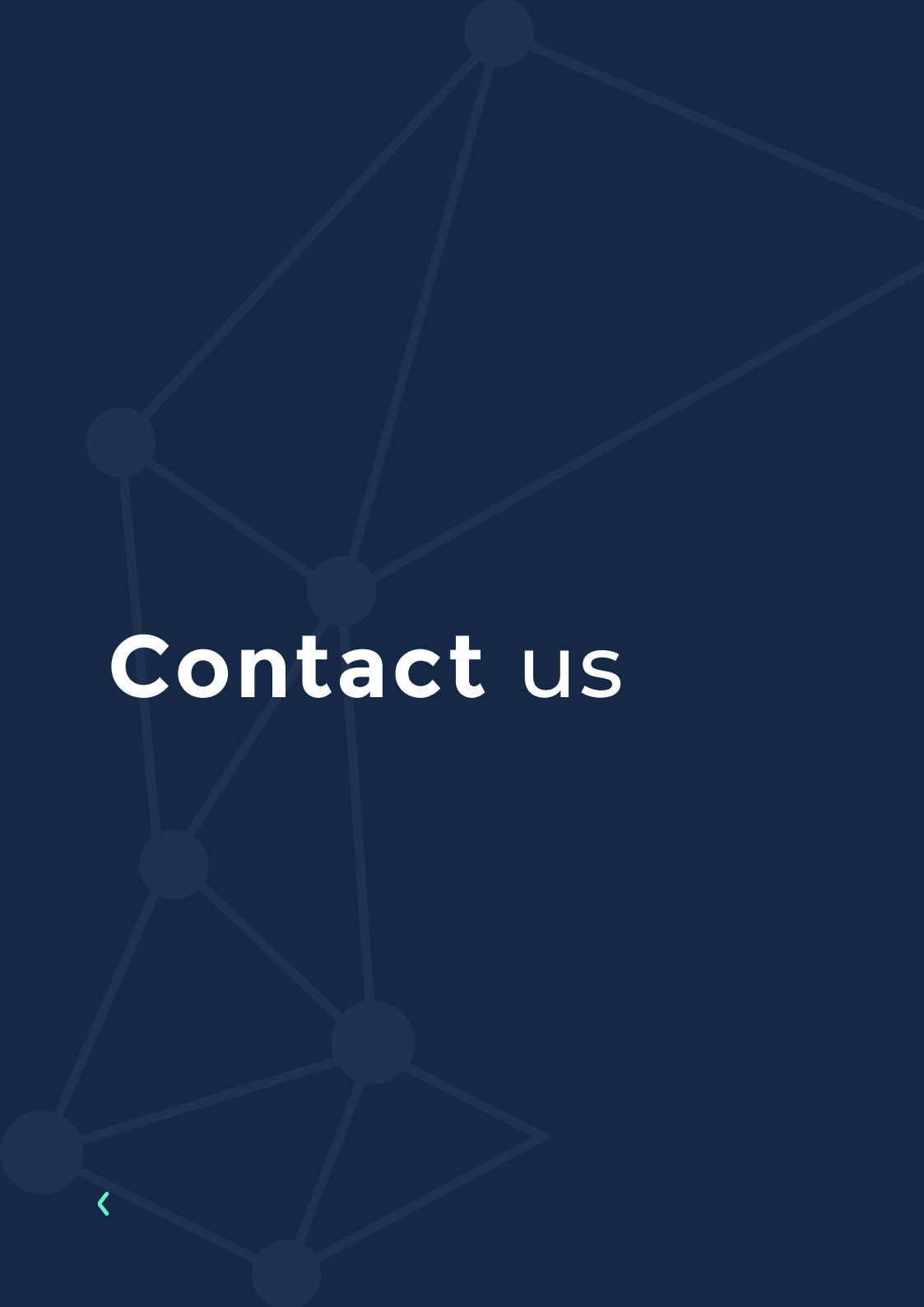
Maricelle Badenhorst
Office Manager
Wealth Management NQF 5

Judith Steinberg
Client Services
Coordinator

Joanita de Beer
New Business
Coordinator

Morlize Hattingh
Telemarketer





Contact us



T 012 998 7430
E mcoetzer@sanlam4u.co.za
