

CREATING LASTING PARTNERSHIPS



ELMARIE DA SILVA
REGISTERED FINANCIAL PLANNER
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I am an independent financial planner with Succession Financial Planning. I have extensive experience in long term insurance with a legal background. My professional approach to Financial Planning ensures client focused solutions built on Ethical Standards and advice. My focus area is business insurance and Investments.

SERVICES OFFERED

I am authorized to provide advice in the following areas:

- Business Assurance
- Investment and Wealth Solutions
- Retirement Planning
- Estate Planning
- Risk Planning
- Wills and Fiduciary Services
- Commercial Short term Insurance

ADVICE PHILOSOPHY

We believe that the purpose of financial planning is to facilitate a lifestyle and extends for an entire lifespan. To achieve this, it must be robust, adaptable and focused directly on what you want out of your life.

SFP and my financial planning model incorporate six steps – client engagement, collecting your information, analyzing your financial status, developing your financial solutions, implementation and regular reviews. These steps allow us to help you identify and prioritize your financial goals and develop a sustainable plan to achieve them.

PROFILE

I have a LLB (NQF 8) as well as a Post Grad qualification in Financial Planning law (NQF 8). I have been in the industry since 2015 which includes working as a registered Tax Practitioner.

My business module is built on comprehensive financial planning with a focus on client centric advice taking all financial and personal factors into account while using legislative requirements and Tax implications to ensure all areas have been correctly addressed in business and personal estates as well as on Investments.

SFP Witbank

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