

creating lasting **partnerships.**



Estelle van As

REGISTERED FINANCIAL PLANNER

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I am registered financial adviser specializing in commercial and personal financial matters. I have extensive experience in the financial planning industry. I am committed to treating each client with Integrity, Honesty, Professional Service & Loyalty.

SERVICES OFFERED

I am authorized to provide advice in the following areas:

- Estate planning
- Risk planning
- Business insurance
- Retirement Planning
- Investment Planning
- Fiduciary Services (Wills)

ADVICE PHILOSOPHY

We believe that the purpose of financial planning is to facilitate a lifestyle that 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.

MY PROMISE TO YOU!

I aspire to offer an experience to all my clients that provides them with the most value. In this manner, I aim to help them realize their financial and life goals by adequately protecting and enhancing their personal wealth and health. Solutions that are tax efficient, cost effective and tried & tested, form the basis of the proposal presented to them. The business and personal will, estate, and the insurance and investment portfolios are parts of a puzzle that enable them to build a unique financial plan. Peace of mind is the ultimate goal.