

## COMPANY PROFILE

### ABOUT SUCCESSION

Our purpose is to facilitate the creation of lasting partnerships between clients and advisers, ensuring that each client of SFP achieves financial freedom and wellness regardless of the life stage they find themselves in.

When you become a client of SFP, you are the recipient of more than the knowledge of one professional – you harness the expertise of the entire SFP team. Our best-in-class financial services and advice expertise, combined with effective execution, enables us to meet any of our client's requirements.

### COMPANY HISTORY

Succession Financial Planning was established in 2010 as a subsidiary of the Sanlam Group. From its humble beginnings, it has become the largest choice insurance brokerage in South Africa with a strong national footprint.

### OUR VISION

We aim to be the leader in holistic financial planning for clients, through the largest professional planner dealership in South Africa whilst creating lasting partnerships with all stakeholders and to remain sustainably compliant within the ethos of legislation.

### OUR VALUES

- Respect for People
- Acting with Integrity
- Leading with Courage
- Caring for one another, our clients and financial planners.

### WHAT WE DO

Financial Planning is the process for the creation, protection, use and preservation of wealth during a person's lifetime and thereafter; in order to leave a legacy of financial soundness. At SFP we believe that our clients deserve peace of mind by knowing that their financial affairs are in good standing by following the industry recognized 6 Steps of Financial Planning. We aid in creating a plan of action and coordinate the management of that plan to ensure that you achieve your future financial goals.

This includes:

- Risk Planning
- Investment Planning
- Savings & Retirement
- Short Term Insurance
- Estate Planning
- Medical Aid Cover
- Succession planning
- Employee benefits

### THE SUCCESSION PHILOSOPHY

Succession's philosophy of customer centricity comes to life through:

- Treating you fairly through understanding your needs; comprehensive analysis of your situation; professional advice, effective compliance standards and on-going care and reviews.
- Having a healthy focus on our financial planners that is based on consistent best-of-breed support to them and their practices ensuring that they can live up to your expectations.
- Building prosperous long-term reciprocal relationships with our partners based on sound business ethics.
- Ethics and expertise underpinned by a continuous learning culture of our financial planners and staff.



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