

# Creating lasting partnerships



## Kyle Barends

**Registered Financial Adviser**  
**B.com Finance**  
**PG Diploma in Finance**  
**PG Diploma in Financial Planning**

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Kyle is an independent financial planner with Succession Financial Planning. He has over 4 years' experience in the advice & insurance industry. He treats each and every client with Integrity, Honesty, and Professional Service & Loyalty

## Services offered

Kyle is authorized to provide advice in the following areas:

- Short term: Personal Lines
- Short term: Commercial Lines
- Business Assurance
- Retirement Planning
- Estate Planning
- Investment & Wealth Solutions
- Risk cover

## Advice Philosophy

We believe that the purpose of financial planning is to facilitate (create or maintain) a lifestyle and it 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, Analysing 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. To make this possible, I equip myself with the necessary knowledge and skillset to ensure that your financial plan is relevant, accurate and executable.

By doing so, I aim to address all your financial needs independently in one solution through the various products and services that I can offer you. I believe in treating all my clients fairly to ensure that regardless of what may happen, you and your loved ones will achieve economic freedom.

You, the client are the cornerstone of my practice and I will continually strive to meet your needs and exceed your expectations.