

Creating lasting partnerships



Sean Young Financial Planner (CFP®)

C: 27 79 476 2983
sean.young@sfpadvice.co.za

Sean is an independent financial planner with Succession Financial Planning, having joined in 2019. He has been in the Financial Services industry for more than 25 years, is a Certified Financial Planner, and member of the Financial Planning Institute of South Africa (FPI).

Services offered

Sean is authorized to provide advice in the following areas

- Business Assurance
- Retirement Planning
- Estate Planning
- Investment and Wealth Solutions
- Risk Protection Planning
- Employee Benefits (Pension / Provident Funds and Group Risk Benefits)

Advice Philosophy

At SFP, 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, 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.

As a Certified Financial Planner, I believe it is my duty to help my client's understand, protect and grow their assets. I will continue to equip myself with the necessary knowledge and skills to ensure that your financial plan remains relevant, accurate and executable. I am whole-heartedly dedicated to my client's interests, and make an ongoing commitment to provide you with professional excellence in every aspect of my advisory role.

I believe **trust** is the most valued trait in any professional relationship. Having access to a wide range of Financial Service Providers, I am able to source the most suitable solutions, tailor made for your personal circumstances and requirements.