SFP
SUCCESSION FINANCIAL PLANNING
Licensed Financial Services Provider

CLIENT VALUE PROPOSITION

www.sfpadvice.co.za
creating lasting partnerships.

TANA DEETLEFS

REGISTERED FINANCIAL ADVISER

Tana is a dedicated financial adviser with SFP, providing expert guidance in Long-Term Insurance, Retail Pension Benefits, Deposits & more. With a client-focused approach, she ensures tailored solutions to protect what matters most.

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OUR PURPOSE

As an adviser of SFP, we are committed to creating long lasting relationships with you, as our client by offering professional, ongoing financial advice and services backed by SFP. Ensuring that the partnership will assist you in your journey to financial wellness.

WE SHARE IN SFP'S PHILOSOPHY TO:

- Treat clients fairly
- Behave ethically and in accordance with best business practice
- Build lasting relationship based on trust

OUR VISION

We aim to be the leader in holistic financial planning whilst maintaining strong relationships with all relevant stakeholders.

OUR VALUES

- Respect for People
- Acting with Integrity
- Leading with Courage
- Caring for one another

WHAT WE DO

At SFP we want to ensure that you are able to make well informed decisions about your financial planning objectives.

The Financial planning process entails wealth creation, wealth protection and wealth preservation which is considered throughout your life; and accommodates for individual as well as family needs. We follow the industry recognised Financial planning process in order to ensure that our partnership coordinates and manages your financial plan to meet your financial goals.

ABOUT SFP

Established in 2010 as a subsidiary of the Sanlam Group, SFP has become the largest insurance brokerage in South Africa with a strong national footprint. As a client of SFP, you harness the expertise of the entire SFP team. The service offering allows for a variety of financial planning opportunities.

This includes:

- Risk Planning and Investment Planning (including estate planning)
- Savings & Retirement
- Short Term Insurance
- Personal Share Portfolio
- Medical Aid & GAP Cover
- Business Assurance
- Employee benefits

OUR PROMISE TO YOU

We promise to take care of your financial plan, objectively and earnestly, providing you with the relevant information and feedback required to meet your financial objectives. Together, we will walk the journey to financial freedom. We commit to reviewing your financial plan at least annually (or as agreed with you) to ensure that you are on track with your financial goals.