SFP SUCCESSION FINANCIAL PLANNING

SFP WEALTH SUCCESSION FINANCIAL PLANNING

SFP SHORT-TERM SUCCESSION FINANCIAL PLANNING

SFP Company Information

2010
Founded

400
advisers

R 22 Bn
Assets under management

National Footprint

150+
CHOICE - Product Providers

Product lines:
Life, Invest, Pre & Post Retirement
Health, Short-term, Employee Benefits

Management support

- Operations
- Regional Management
- Business Admin Consultant
- Sales Enablement
- Practice Management

SFP Value Proposition

Systems

- CRM
- Compliance
- Commission
- Calculators & tools

Branding

- Personal Adviser Web
- Digital Business Card
- Marketing material

Group Life Cover

PI Cover

Commission splits – Up to 90% split

Structured succession plan

Professional partners (estates/wills/trust)

Financing facilities

Fees for Advice

SFP is a licensed financial services and registered credit provider