

# FINANCIAL PLANNING

EXCELLENT PROFESSIONAL VALUE ADDED SERVICE



## ABOUT US :

GIB Financial Planners partner with you to fully understand your financial goals and needs. We develop, implement, and maintain a financial plan that is suitable for you. Our solutions ensure that your family, business, and hard-earned assets are protected, and that you are able to create long term wealth and financial security.

Our responsibility is to you as our client and not to any specific provider.

## 6 STEPS OF FINANCIAL PLANNING

"HOW IT RELATES TO YOU"



-  Establishing and defining a professional relationship  
**"Pleased to meet you"**
-  Gathering data, including goals  
**"Tell me about yourself"**
-  Analysing and evaluating your financial status  
**"We are working on feedback for you"**
-  Developing and presenting financial planning recommendations and/or alternatives  
**"Here is what you can do"**
-  Implementing the financial planning recommendations  
**"Great - let's get started"**
-  Monitoring the financial planning recommendations  
**"We are partnering with you"**

### YOUR FINANCIAL LIFE

- |                              |   |                                    |
|------------------------------|---|------------------------------------|
| Leaving a legacy             | → | Wills & Estate Planning            |
| Protecting you & your family | → | Life, disability, sickness benefit |
| Reaching your goals          | → | Investment planning                |
| Building your future         | → | Retirement planning                |
| Looking after your health    | → | Medical aid                        |



## YOUR NEEDS, OUR SOLUTIONS

