KWANELE
SIBANDA

Financial Advisor

Kwanele Sibanda is a young professional with a passion for people, helping them in making crucial financial planning decisions on wealth creation, management, preservation and other complex related issues.

My past eight years has involved me in the financial services industry in different positions most of which has been financial planning. My focus on client needs has helped me to understand my my clients much better, have been able to communicate my services to them in clear terms, creating trust and mutual benefits between clients and me. The results have been long lasting relationships that are growing from strength to strength.

I have applied myself to growing my knowledge base by study of our industry, having a Bachelor of Commerce Degree in marketing, I have enrolled myself for a postgraduate diploma in Financial Planning with the university of the Free State, and my objective is the attainment of a CERTIFIED FINANCIAL PLANNER designation as I want my clients to get the best advise. I however in the meantime have strong partnerships with other professionals especially on law to help my clients with wills and other estate planning tools.

My specialties are: PERSONAL FINANCIAL PLANNING -Life assurances and risk management -Medical aid - Retirement planning -Post retirement investment management -Investment planning -Estate Planning (wills and trusts) - Tax planning. BUSINESS FINANCIAL PLANNING - Business risk management and Insurance planning - Buy and sell; key man agreements - Employee Benefits (pension/ provident/ medical aid schemes) - Future Liability planning and Key Employee Retention (Preferred Compensation Schemes).

CONTACT

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QUALIFICATIONS

Bachelor of Commerce Marketing Qualifications Degree | *2016*

BUSINESS EXPERIENCE

Mpumelelo Financial Services | *Financial Advisor, 3years*

Lancelot Ncube Advisor | *Assistant Financial Advisor, 4 years*

Family Care Advisors | *Admin Assistant, 2years*

Discovery | attooh! HEALTH | WEALTH | LIFE

DOES YOUR MONEY NEED A "PROFESSIONAL TRAINER"?

Financial planning is more than just numbers on a piece of paper. It's about your life – and what you want out of it. Do you understand where you are? Do you know what your financial goal is? How about the security of your family's future? Financial planning connects life with finance and evaluates the assets needed to help make a dream come true. We use financial tools to help us learn about your goals to offer guidance for every step of your journey in this unpredictable life.

MY SERVICES INCLUDE

INDIVIDUAL / FAMILY INSURANCE

- Life cover
- Disability
- Severe Illness
- Income continuation benefit
- Tax Free Investment/savings
- Retirement planning
- Educational savings

BUSINESS INSURANCE

- Keyman Insurance
- Buy/Sell Agreements
- Contingent Liability

PERSONAL BANKING

HEALTH

- Medical aid
- Gap cover

INVESTMENTS

- Local, guaranteed and offshore
- Retirement investments

SHORT TERM INSURANCE

- Personal lines
- Commercial lines

FIDUCIARY

- Wills and Estates
- Trusts

EMPLOYEE BENEFITS

- Group Risk
- Retirement Funds
- Group Health Solution

VITALITY REWARDS

- Wellness management
- Wellness days

Every client is unique and so is my process in my practice. Allow my team and I to create a personalised, tailor-made financial solution for you. My advice is based on your needs and wants and I will truly commit to your overall financial and holistic success. **Financial freedom could be your reality.**

THE BUTTERFLY EFFECT

The butterfly with its metamorphosis - alludes to our lives as humans. Change is the ONLY constant. We celebrate growth, change and your own personal metamorphosis. We'll be there on the journey to guide and assist you toward a life of "permanent purpose".