



+ (27) 87 236 5000



www.anderson4u.co.za



admin@anderson4u.co.za
PO Box 4534 Polokwane 0700



27A Rabe Street, Polokwane, 0699



OUR VISION

TO BECOME THE TRUSTED HOUSEHOLD NAME IN THE FINANCIAL SERVICES INDUSTRY, WITH A REPUTATION FOR SOUND ADVICE, EXPERIENCED PERSONNEL AND STANDARDIZED SERVICE LEVELS IN A NATIONWIDE FOOTPRINT.

WE ARE KNOWN FOR OUR:

Independence

Confidentiality

Competence

Assistance

Integrity

Honesty

Friendliness

Acumen

OUR TEAM OF SPECIALIZED EXPERTS

The specialized advisors of Andersons Financial Services have unique knowledge and the know-how to ensure that the advice we give, always remains a step ahead of the competition. This means that our clients are assured of a better return. Our team is:

Independent

We are independent financial advisors, not bound to do business with a particular insurance company or investment institution. We comply with the laws and rules of the industry, ensuring your financial security.

Knowledgeable

Our team of experts regularly undergoes further development and training. This ensures that our clients receive expert advice, keeping up to date with the latest legislation in the industry. Our CFP® qualified advisors ensure that our advisors and clients receive only the best information with the necessary support of their academic background.

Experienced

When added up, our advisors have more than a century of experience in the industry. The quality of the advice we give is regularly being recognised by the industry with prestigious awards. This means that our clients can be satisfied that they are receiving proficient advice.

Client orientated

Our diverse and unique relationships with our clients create a network wherein our clients are not only doing business with us, but also doing business with each other.

OUR OFFICES

All our offices are easily accessible, in a safe environment with ample parking. Our offices have been laid out in such a way that confidential issues can be discussed with ease. Visit us and experience the heart-warming generosity and hospitality that became our trademark. Here we can provide you with fast and effective service, supported by a structure with technology that is up to date and expert personnel.

Our offices are situated in: Polokwane (27a Rabe str.)
Standerton (40a Beyers Naude str.)
Mokopane (113 Thabo Mbeki str.)

EXPERIENCED PERSONNEL

Our personnel are handpicked for their passionate ability to handle unmerciful administrative tasks carefully, accurately, and successfully. Even though we possibly have the world's most difficult (yet interesting) clients, we can handle them perfectly without breaking out in a sweat or the intake of prescription medication. We are built to last. Our personnel are:

Experienced	We conform to the laws and regulations of the trade, and together with this, also ensure your financial safety. Added together our staff has more than a century worth of experience in the field of assurance administration.
Committed	Our personnel really do care for our clients. They are regularly seen sitting through days and nights solving our clients' problems, without any additional compensation.
Ethical	We take work ethics seriously. To our staff, this matter is of the highest importance. All tasks are dealt with swiftly, correctly, and efficiently, with timely feedback to our clients.
Friendly	Our staff's affability is spontaneous and well-known to all of our regulars. Every interaction with us is memorable.
Earnest	All information provided to us will be handled as extremely confidential, and not passed on to another entity without prior consent from all parties concerned.

OUR CLIENTS

Our client base is not focused on any particular group of people. We serve people from the head of the boardroom table all the way to the bottom of the mail room. Right from radio and TV personalities, to security patrolmen and pensioners. All of them having only one concern in common and that is their financial security. Our clients include:

- Business owners
- Farmers
- Government officials in high positions
- Doctors, engineers, and other professional persons
- Managers of companies
- Families and
- Pensioners

They all expect superior, independent advice and appreciate professional and tailor made solutions.

OUR ADVICE PROCESS

The process that we apply when dealing with clients can be broken down into six basic steps:

1. Initial Contact

Once the client is referred to us, we will contact the client within 24 hours.
Arrange a time for an interview with the client.

2. Introductory appointment

Have an introductory appointment with the client.
Conduct a fact finding interview and collect all client data.
Ensure that the data collected is accurate and comprehensive and includes the client's specific personal and professional goals and objectives.

3. Data Analysis

Based on the data collected, identify all the issues relevant to the client's situation.
Assess and analyze each issue.
Formulate strategies to achieve the client's present needs.
Review all available options in order to attain the client's future goals.

4. Recommendation

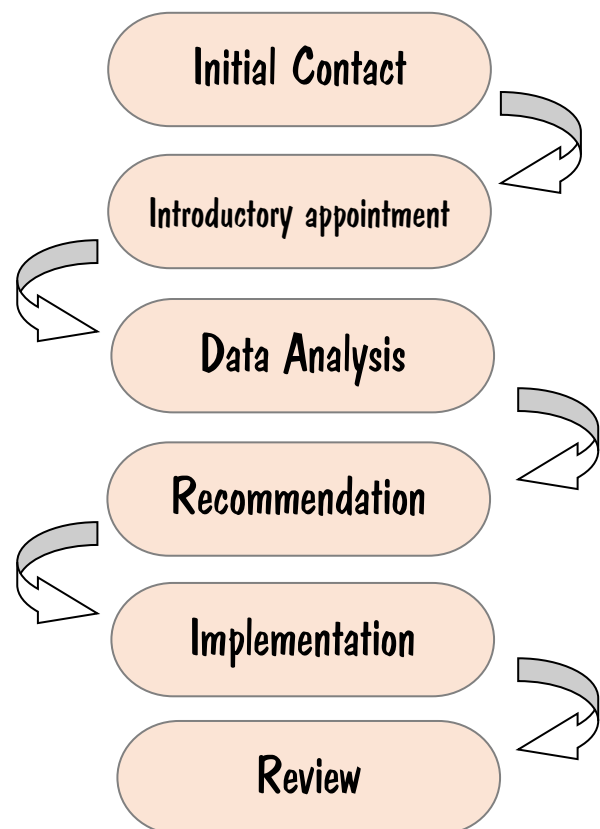
Describe the client's current financial position.
Provide an analysis of the client's needs and goals.
Provide product recommendations to achieve the clients stated needs and goals.
Cover all compliance related matters.
Provide the client with details on future reviews and ongoing monitoring.

5. Implementation

Prepare to present our written recommendations.
Confirm the presentation interview with the client.
Formally present our written recommendations.
Discuss issues and queries to ensure that the client is comfortable with the recommendations.
Gain client consent.
Complete all the necessary paperwork, with client signatures and approvals.
Lodge the paperwork.
Provide feedback to the lead source via a written lead feedback sheet.

6. Review

Arrange a client review date.
Prepare for and conduct the client review.



Our services summed up:

Life Insurance:

- Risk cover
- Life cover
- Disability insurance
- Income provision
- Cover for severe illnesses
- Term cover
- Mortgage insurance
- Insurance for professionals
- Key person insurance

Investments:

- Pension funds
- Retirement annuities
- Life- and Living annuities
- Endowment policies
- Collective investment schemes
- International investments
- Employee benefits

Medical:

- Medical aids
- Dentistry insurance
- Gap cover

Short term:

- Personal insurance (Home and motor)
- Commercial insurance
- Marine insurance
- Goods in transit
- Heavy haulage
- Liability insurance

Other services:

- Personal Tax services
- Portfolio management
- Wills
- Trust administration
- Estate administration
- Investec bank services
- Retirement planning
- Estate planning

All the above mentioned services are offered in proud association with some of South Africa's biggest names in the insurance industry.

Our service providers are:

Sanlam	PPS	Momentum	Hollard	Liberty
Stanlib	Discovery	AIMS	Old Mutual	Santam
FMI	Glacier	Legacy	Stratum	ProfMed
Denis	BestMed	MediHelp	Investec Bank	Brightrock
Old Mutual Insure		Resolution Health		Key Health

