



**ESTEEMED**  
FINANCIAL SOLUTIONS

# Esteemed Entrepreneur Kit

Esteemed Financial Solutions  
(Pty) Ltd is an authorised  
financial service provider.  
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# Company Overview

Esteemed Financial Solutions is an independent authorised financial service provider, offering comprehensive financial planning, financial coaching, and employee wellness programs.

At Esteemed Financial Solutions, we guide our clients on a 3-stage journey focused on becoming financially independent, accumulating and protecting wealth, and retiring comfortably.

All of our clients, including employed young professionals, entrepreneurs, young families, and retirees, come from diverse backgrounds.

We provide our clients with individualised service, suitable information, and ongoing financial guidance so they can make sound financial decisions.

*“Save when you don’t need it, and it’ll be there for you when you do.”*

- Frank Sonnenberg





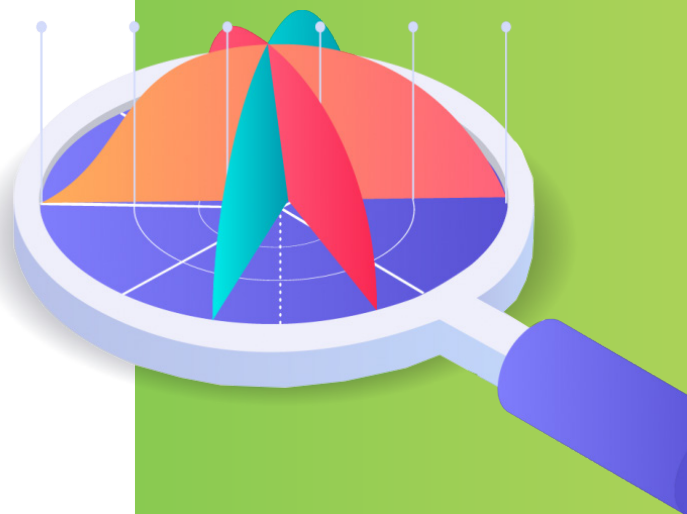
# Our Commitment

We educate, empower, and advise individuals at all stages of their lives. We work with them to anticipate and navigate major life transitions, ensuring that they meet their financial and personal goals.

We are committed to assisting individuals at various stages of their lives in securing their financial futures through HOPE.

-  **Helpfulness**
-  **Openness**
-  **Professionalism**
-  **Effectiveness**

Under our care, we will make your financial goals a reality by guiding you on a 3-stage journey of becoming financial independent, accumulating, and protecting wealth and retiring comfortably.





# What is the Esteemed Entrepreneur Kit?

The Esteemed Entrepreneur Kit is the customized package that will give the employer and employees skills and information that will last for a lifetime. Designed with the needs of small businesses in mind, we give you the tools that you need to better understand the working world, and to plan for a future of growth, sustainability and stability.

## How does the Esteemed Entrepreneur Kit help me?

The Esteemed Entrepreneur Kit is designed to help employers and employees manage their finances more effectively and redirect their money toward financial independence. This kit includes a comprehensive financial needs analysis, and the formulation of a growth plan that includes risk, investment and succession planning expertise.

This one year package includes educational content and regular calls with our experts to provide you with insight into your business performance.

The Esteemed Entrepreneur Kit is your foundation for a successful business future.



# Esteemed Entrepreneur Kit Packages

## Micro Package

3-5 years in business.

Minimum 10 employees.

R1250 excl VAT per month  
for 12 months.

## Growth Package

5+ years in business.

Minimum 10+ employees.

R3000 excl VAT per month  
for 12 months.



# Our Services

**Comprehensive financial needs analysis with a plan that includes the following:**

1. Risk Planning
2. Investment planning
3. Succession planning
4. Group benefits:
  - Group Life
  - Group Funeral
  - Group Retirement funds
  - Group Medical Aid
5. Employee wellness workshops when required.
6. A call per quarter or as and when required.
7. Virtual annual review.
8. Monthly investment statements.





# ESTEEMED

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## Get In Touch



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