




ESTEEMED
FINANCIAL SOLUTIONS

Esteemed Wealth Kit

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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 Wealth Kit?

The Esteemed Wealth Kit is a comprehensive all-inclusive financial package that will take you on a journey of being;

1. Financially independent,
2. Accumulating and protecting wealth,
3. Retiring comfortably.

Who is the Esteemed Wealth Kit intended for?

Esteemed Wealth Kit is designed for those young professionals as well as those who are married with children, who want to grow and protect wealth for their family. It is also meant for people who want to retire in comfort.

How does the Esteemed Wealth Kit help me?

We will provide you with the tools you need to formulate a plan to eliminate or reduce your debt in only a few steps, as well as develop a habit of regular saving to help you attain your goals. You will gain stability and peace of mind by ensuring that you have a safety net for the important what-ifs in your life.

You will create an emergency fund that will give protection in times of crisis and financial stress, as well as to create a long-term investment strategy that will take advantage of tax-advantaged investment vehicles.

The Esteemed Wealth Kit will assist you in developing a retirement strategy that will teach you to be disciplined in your long-term goals.



Esteemed Wealth Kits

Esteemed Wealth kits are as follows includes comprehensive report and implementation of the solutions.



1. Foundation Kit

It is created for individuals in the foundation phase of their lives, including young professionals and married couples with children, seeking to nurture and safeguard wealth for their families.

Additionally, it caters to those aspiring for a comfortable retirement.

Our Services

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

1. Investment planning
2. Risk planning
3. Estate planning
4. Retirement planning
5. Education planning
6. Health planning

- A bi-annual call.
- Annual tax filing.
- Virtual annual review.
- Monthly investment statements.
- Educational content quarterly.



2. Enhanced Kit

It is designed to elevate your financial strategy to new heights by offering enhanced features tailored to individual financial goals and circumstances. It can include strategies for your family and small businesses.

Our Services

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

1. Investment Planning
2. Risk Planning
3. Estate Planning
4. Retirement Planning
5. Education Planning
6. Health Planning
7. Cash flow Management

- Bi-annual financial coaching session.
- A bi-annual call.
- Annual tax filing.
- Virtual annual review.
- Monthly investment statements.
- Educational content quarterly.



3. Ultimate Kit

It emphasizes the importance of asset structuring by expertly tailoring asset management to individual goals and circumstances, optimizing financial outcomes and providing a solid basis for long-term wealth growth and preservation. Emphasis is placed on multiply business and asset classes and legal structures including family legacy planning.

Our Services

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

<ol style="list-style-type: none">1. Retirement Planning2. Risk Planning3. Estate Planning4. Health Planning5. Investment Planning6. Tax Planning7. Asset Weighting Management8. Legal & Business Entities	<ul style="list-style-type: none">• Quarterly financial coaching sessions.• Four calls per year.• Annual tax filing• Bi-annual review.• Monthly investment statements.• Educational content quarterly.• Masterclass content
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ESTEEMED

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