



ESTEEMED
FINANCIAL SOLUTIONS

Esteemed Entrepreneur Kit

Esteemed Financial Solutions
(Pty) Ltd is an authorised
financial service provider.
License no. 46156

✉ admin@esteemed.co.za

☎ 011 326 0487

☎ 064 053 8961





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Company Over view

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 financial independent, accumulating and protecting wealth, and retire 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



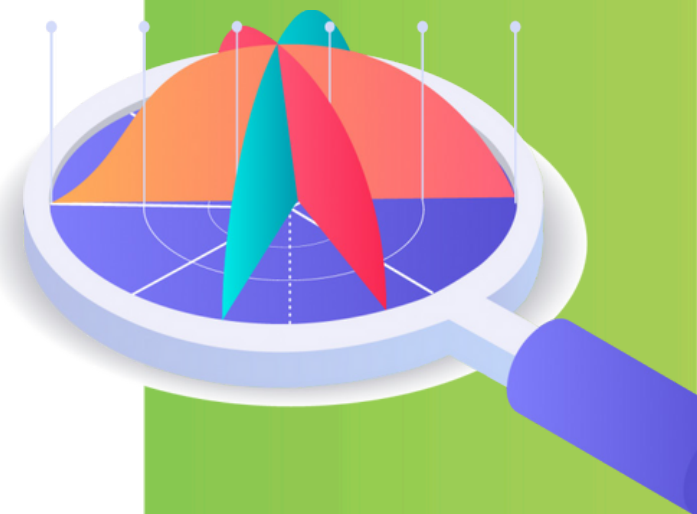


Our Commitment

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.





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.

R1700 incl VAT Once off

Growth Package

5+ years in business.

Minimum 10+ employees.

R3400 incl VAT Once off



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 Cover
 - Group Funeral Cover
 - Group Disability Cover
 - Group Critical Illness Cover
 - Group Retirement Funds
 - Group Medical Aid & Medical Insurance
5. Employee wellness workshops when required.
6. A call per quarter or as and when required.
7. Virtual annual review.
8. Monthly investment statements.







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Get In Touch

-  www.esteemed.co.za
-  admin@esteemed.co.za
-  011 326 0487
-  064 053 8961 42
-  Atrium on 5th, 9th Floor,
5th Street Sandton,
Johannesburg 2196