



WHAT WE CAN DO FOR YOU

- **Wealth creation and preservation**
Help you build your dreams and secure your family's future.
- **Retirement planning**
We help you every step of the way - from before retirement, at retirement and once you're retired. We'll give you a professionally managed plan, whether you're part of a company fund or as an individual client.
- **Investment planning**
Invest your savings through our unique portfolios and product solutions.
- **Tax and estate planning**
Let us take care of your estate planning, from drafting your Will to overseeing asset distribution of your estate.
- **Motor and household insurance**
We offer cost-effective, hassle-free insurance and a team that offers outstanding customer service.
- **Life and disability cover**
Get the right advice about the cover you need. Make sure you and your family are taken care of financially if you are disabled or die before you retire.
- **Medical aid**
Cover all your family's healthcare requirements with personalised solutions.
- **Online services**
We offer groundbreaking tools and information to help you plan your finances efficiently and conveniently.

INDIVIDUAL ADVICE

Contact your Alexander Forbes Financial Adviser to find out how we can help you take control of your finances, health and retirement planning.

An Alexander Forbes Financial Adviser will create long-term financial strategies to suit your individual needs.

We look forward to partnering with you for the future.

RESEARCH, INNOVATION, IMPLEMENTATION

Our guiding principles for your financial well-being

YOUR INDIVIDUAL FINANCIAL SOLUTIONS

At Alexander Forbes we work hard to understand your needs and build financial solutions to meet your specific expectations and objectives.

Our strong market reputation and expertise is only the tip of the iceberg. The advice we offer is based on the rich resources, innovations and backing of the Alexander Forbes Group.



Financial planning consultants
(certified financial planners)

Houseview and advice principles

Standardised best advice practices

Research and product development

Cutting edge tools and technology

Due diligence processes lead to
approved product accreditation

Dedicated advisory committees

Tactical asset allocation committees

Compliance and audit

Fiduciary services

Administration platform

Actuarial services

Legal services

Industry body representation

Product investment support

WHAT YOU SEE

ALEXANDER FORBES
FINANCIAL PLANNING CONSULTANTS

WHAT YOU EXPERIENCE

THE DEPTH OF OUR EXPERTISE,
RESOURCES AND SUPPORT