

Lonfin MOB: Value Proposition



Join Sanlam’s Lonfin Managed Outsourced Business in Cape Town and become part of our professional adviser network. Lonfin is dedicated to making the most of every opportunity given to us and if you’re a highly motivated individual with a healthy mix of independence, passion and drive you may have all the characteristics required to represent Sanlam.

This is an opportunity to further your career within one of the largest, most dynamic financial services companies in South Africa.

Interested?

Personal Skills And Attributes Required:	What you need to apply:
Entrepreneurial spirit	2+ years Financial Industry Experience
Self-discipline & a results-driven approach	A recognized qualification according to your DOFA
Tenacity, honesty, integrity and ethics	RE5
Great business acumen	Driver’s license and own reliable transport
Excellent communication skills	Matric certificate, Copy of South African ID
Exceptional relationship-building skills	Computer Literacy

Career Incentives

Strong leadership and support



The Sanlam Connect managers and Authorised Principals of Bluestar businesses play an integral role in developing our intermediaries ongoing.

Lucrative Remuneration and Rewards



Sanlam offers a variety of contracts with different commission levels. Our remuneration structures are underpinned by a high-performance culture, which means your productivity level and quality of the advice you give your clients affects your commission.

Insurance

Financial Planning

Retirement

Investments

Wealth

Supportive Work Environment



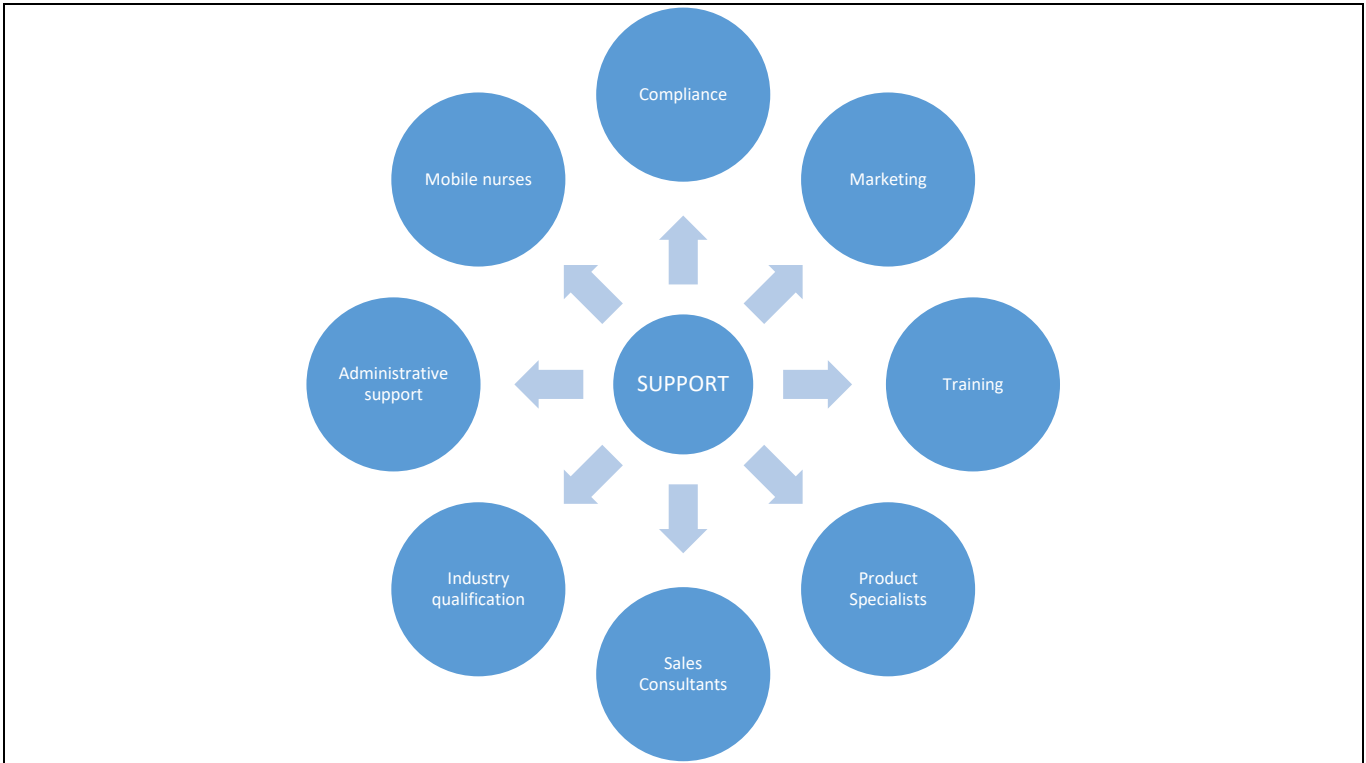
Intermediaries have full access to a range of specialist support staff, promoting an ethos of cohesion and mutual support.

Development and career progression opportunities



Sanlam offer several career opportunities for advisers with different levels of independence, benefits and support.

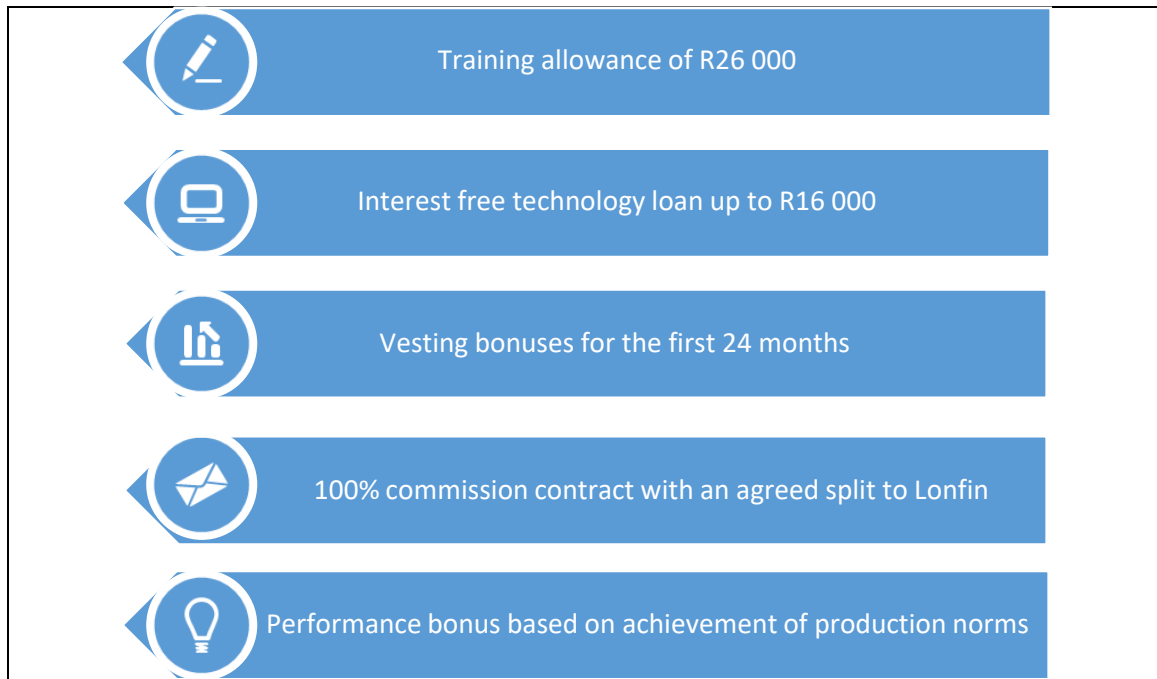
Support to ensure your success:



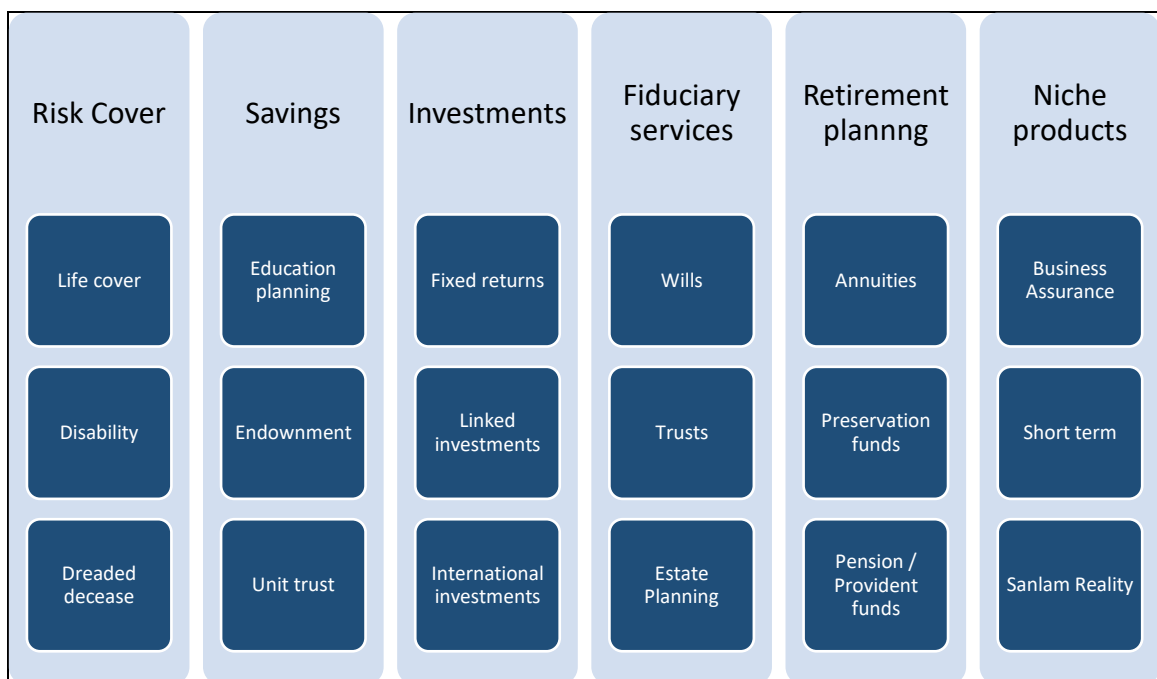
Memberships to funds and schemes:

Group Life insurance, including spouse cover
Trauma cover and optional GAP cover
Temporary disability cover
Membership to pension fund
Membership to medical aid (choice between Fedhealth & Bonitas)
Funeral cover

Financial support:



Our product mix:



Your contract at Sanlam:

Business Impact	Lonfin contracted Adviser
FSCA registration and licensing	<ul style="list-style-type: none"> ○ Sanlam carries the burden and cost of maintaining the FSCA license; ○ Sanlam ensures that all advisers are registered for the correct product categories with the FSCA & that records are automatically updated when a representative completes any relevant training.
Professional accreditation to meet FIAS requirements	<ul style="list-style-type: none"> ○ Sanlam pays for the Wealth Management (NQF 5) qualification ○ The company offers bursaries for <ul style="list-style-type: none"> ○ a post graduated diploma in Financial planning (CFP) ○ Advance CFP ○ Sanlam pays for the Regulatory Exam (first attempt)
Compliance	<ul style="list-style-type: none"> ○ Sanlam puts in place compliance control measures to enable business to comply with regulatory requirements; and ○ Monitors that the measures are effective and reliable.
Training in sales techniques	<ul style="list-style-type: none"> ○ Free
Accreditation on product knowledge	<ul style="list-style-type: none"> ○ Provided by Sanlam's Distribution Academy according to set schedules
Client information	<ul style="list-style-type: none"> ○ Free Astute subscription with unlimited transactions
Technology support in managing client info & advice given	<ul style="list-style-type: none"> ○ Sanfin/Advice Partner provides all functionalities to comply and is free for all Advisers
Technology support	<ul style="list-style-type: none"> ○ Interest free technology loans up to R16 000 & repayable over 24 months for newcomers ○ Free on-site services of Sanlam Technology Consultant ○ Free Sanfin/Advice Partner Helpline support
Marketing	<p>Subsidies w.r.t.:</p> <ul style="list-style-type: none"> ○ Advertisements / flyers / pamphlets, etc. ○ Conference material.
Continued Professional Development	<ul style="list-style-type: none"> ○ Provided by Sanlam ongoing