

# VALUE PROPOSITION

*Dolphins are free spirits who display considerable care and intelligence in their interactions. They represent how we conduct our business at Bwise.*

[Request Call / Meeting](#)

• • •

Contact Bwise

[info@bwise.co.za](mailto:info@bwise.co.za)



## ABOUT US

**Bwise Financial Solutions [Bwise]** is a Financial Services provider and a Juristic Representative of FSP 8933 that focuses on understanding the Financial Planners' and clients' needs - both financially and emotionally. The insurance and financial industries demand that integrity and intelligence be applied to a changing marketplace, with innovative and complex products. With the passion and support of a national financial solutions group, we can assist in securing the future of the Financial Planner and his/her clients.

### Our Objective

Our objective is clear: To empower financial planners (life and short-term) to become successful business owners and to have a sense of belonging

### Our Purpose

To make financial freedom a reality for our financial planners and their clients.

### Our Values

- Financial Planners - The heart of our business
- A fine reputation - Built on respect, accountability and real hard work
- Win-win partnerships - The way we work
- Getting it right - Consistently
- Excellent service - A non-negotiable

### Area of Business

- Risk / life insurance
- Short-term insurance
- Investments
- Health
- Fiduciary services

**Bwise Financial Solutions** has a presence in Gauteng, KwaZulu-Natal, Eastern Cape, Western Cape and Free State. The intention is to establish **Bwise** branches nationally.

[Request Call / Meeting](#)



Contact Bwise

[info@bwise.co.za](mailto:info@bwise.co.za)

## INTRODUCTION

This value proposition is for the financial planner seeking true independence, but with a sense of belonging. Instead of focusing on products and companies, **Bwise Financial Solutions [Bwise]** focuses on understanding the financial planner's needs - both financially and emotionally. The insurance and financial industries demand that integrity and intelligence be applied to a changing marketplace, with innovative and complex products. With the support of a national financial solutions group, we can assist to secure your future.

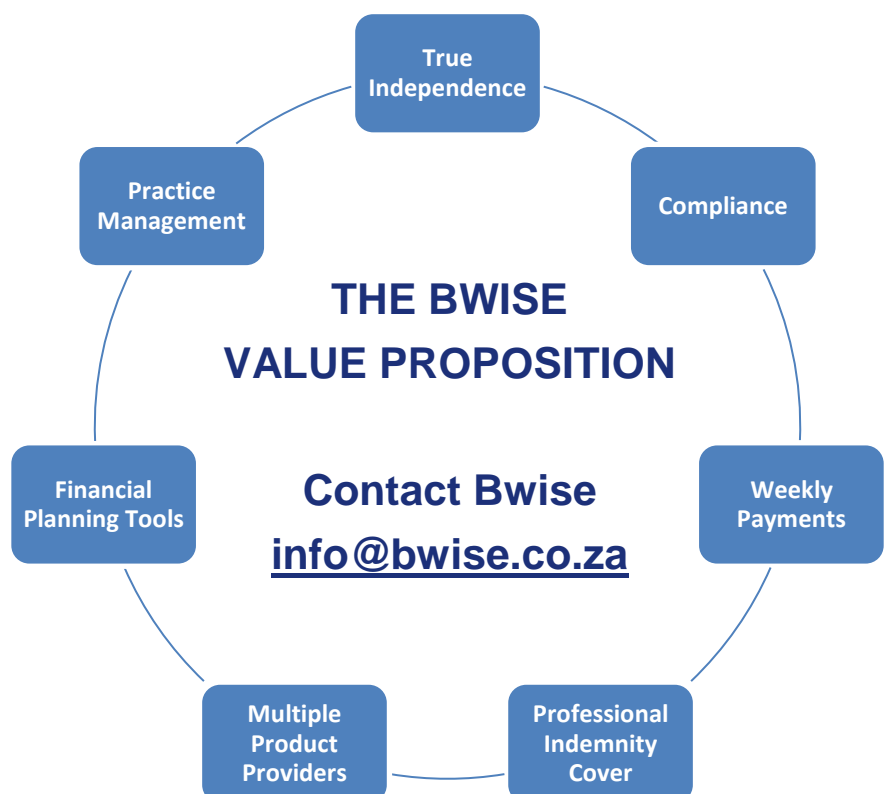
Financial planners from **Bwise** will have access to multiple product providers, and we will ensure that financial planners are up to date with all legal requirements.

**Bwise** prides itself on the high standard of its team's professionalism. The team comprises individual specialists with different, yet complementary skills. Financial planners are provided with the tools to ensure they are forerunners of the dynamic financial planning industry.

With services ranging from, inter alia, compliance, practice management and commission administration, **Bwise** recognises the need for end-to-end support.

At **Bwise Financial Solutions**, the financial planners are equipped to be business owners and to build a business with a true transferable value. We define succession planning or exit strategies for each financial planner. Isn't it time you look at the income potential and wealth building opportunities that can only come when you are in control?

**Bwise's** most important resource is "YOU", the person who makes or facilitates a sale. Loyal financial planners will create value for themselves with the support of **Bwise**. We believe that the mutual creation of value forms the cornerstone of you being able to operate a successful financial services business.



Request Call / Meeting

• • •

Contact Bwise

[info@bwise.co.za](mailto:info@bwise.co.za)

## VALUE PROPOSITION

**Bwise's** rigorous procedures are founded on extensive knowledge and in-depth research into the financial and economic environment. Further to this procedural framework, **Bwise** provides financial planners with a quality of service that is unique in the financial services industry.

**We offer a range of services to suit the needs of the Independent Financial Planner.**

Included in this offer is inter alia, the following:

- True independence
- Access to multiple contracts
  - Risk / life insurance
  - Short-term insurance
  - Investments
  - Health
  - Fiduciary services
- Compliance
  - Financial needs analysis
  - Comprehensive compliance audits and spot checks
  - Regular updates and feedback on legal issues / developments
  - Electronic interface
  - FSB returns
  - Process planning and implementation
  - Compliance guidelines / training
- Professional indemnity cover
- Financial planning tools
- Practice management
- Access to astute
- Weekly commission administration
- Owner of client base

## CONTACT BWISE

Allow us to help you to build an extraordinary independent practice. With **Bwise Financial Solutions**, you can have both the control you want and the support you expect.

Take advantage of the best offer in the market by contacting us today:  
[info@bwise.co.za](mailto:info@bwise.co.za)

*"We all leave footprints in the sand.  
The question is...  
Will we leave a legacy?"*