



Advies

Boedelbeplanning

Aftreebeplanning

Beleggings

Lewensversekering

Korttermynversekering

CFP Johan Marais, CERTIFIED FINANCIAL PLANNER®

FSP Licence 21024 Tel 053 7120534
www.jmfs.co.za



"Goed beplanning is die sleutel tot sukses"

Advice

Estate Planning

Retirement Planning

Investments

Life Cover

Shortterm Insurance



Johan Marais CFP®

My name is Johan Marais, qualified as a Certified Financial Planner (CFP). Since 1992 I provide financial advice and intermediary services. I act on instruction from Johan Marais Financial Services CC, an authorized financial provider, which has accepted responsibility to provide financial services.

Registered Product Suppliers

Johan Marais Financial Services CC has written authorization and is accredited to market product from the following insurers and or financial institutions :

Long term Insurers

Sanlam / Old Mutual / Momentum / Altrisk / PPS

Short term Insurers

Santam / M&F / Auto en General / Momentum Short Term / CIA / Thatch Risk

Investment Companies

Sanlam Private / Sanlam Glacier / Momentum Wealth / Fairbairn Capital /Allan Gray / Coronation / Investec / I-Transact

Medical Funds

Momentum/Discovery/Bestmed/Profmed

Group Benefits

Sanlam / Old Mutual / Momentum

Disclosure

We commit ourselves to the requirements of the Financial advice and intermediary act, 2002 (Act 37 of 2002), Johan Marais Financial Services CC registered in terms of the act. FSB Registration number: 21024. Contact Details of the FSB – FAIS ombud 012 – 428 8000 / website: www.fsb.co.za

A copy of the license, that contains details of the financial services which I am authorized to provide, as well as any exemptions, are available on request. Compliance of the FAIS-act is monitored by Masthead Distribution Services (Pty)Ltd, a compliance practice that is approved by the Financial Services Board. Their postal address is P.O. Box 856,Howard Place, 7450. Contact number: 021 686 3588(t) and 021 686 3589(f).

Please take note that we keep, in consideration with legislation, a fully disclosure register. The aim of the registry is to notify our clients of any financial or proprietary interest that we might have obtained in the course of our business activities. It also lists any business relationships we have with our product suppliers. This register insures transparency and is available on request.

CK 2004/118666/23

44 Beare Street, Kuruman | P.O. Box 935, Kuruman, 8460 | ☎ 053 712 0534

17 Joubert Street, Montagu | P.O. Box 263, Montagu, 6720 | ☎ 023 614 1074

74 Fairbairnstreet, Worcester 6850 | ☎ 023 347 6483

☎ 086 720 0069 | ☎ 073 688 1547

E-Pos: info@jmfs.co.za | ✉ www.jmfs.co.za

We are compelled to adhere to certain requirements in order to provide financial advice. According to current requirements, I do comply as a Certified Financial Planner. Our business is trading as a closed corporation.

All information received from you shall be treated as confidential and will only be made known if you give written permission, or when I am required by legislation to do so.

If you are dissatisfied with any aspect of my service, I request that you provide me with a written complaint to the above mentioned address. A copy of my compliant policy is available on request.

Value Proposition for our client

To take reasonable steps to obtain client information with regard to the client's financial situation, financial product experience and goals in order to provide applicable advice.

We provide the following services:

- Retirement Planning
- Personal Financial Planning
- Risk Planning
- Business Insurance
- Estate Planning
- Short term Insurance Planning
- Medical Care – Medical Funds

We facilitate the following services:

- Drafting of Wills
- Establishing of Trusts
- Establishing of CC's and Companies
- Tax Services
- Share Portfolio Management



Vicki Oelofse



Lenie du Preez



Daleen Marais

We are registered by the following bodies:

I am authorized to give financial advice and deliver broker

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services in the following product categories:



FSB – Financial Services Board



Masthead Advisory Services



Council for Medical Schemes



FPI – Financial Planning Institute

Category 1

- 1.1 Long -term Insurance: Category A
- 1.2 Short-term Insurance: Personal Lines
- 1.3 Long -term Insurance: Category B
- 1.4 Long -term Insurance: Category C
- 1.5 Retail Pension Fund Benefits
- 1.6 Short-term Insurance: Commercial Lines
- 1.7 Pension Fund Benefits(Excluding Retail Pension Benefits)
- 1.8 Securities and Instruments: Shares Securities and
- 1.10 Investments: Debentures and scrutinised debt Participating interests in Collective Investments Schemes
- 1.14 Health Service Benefits
- 1.16 Long -term Insurance: Category B
- 1.20

Johan Marais

Signature of broker

Signature confirming receipt of the document

Date of introduction to client: _____