

# FRANCIS BOERSMA

*Financial Advisor*

A journey that started more than 20 years ago where the first premium in the form of cash or a cheque was attached to a hand-written application form...and to date still keeps my attention.

As a mother, now, of 2 very energetic young men, I entered the industry in 1999 and were amazed and intrigued by the financial planning process and how the correct way of utilizing all the advice available, could lead to a sustainable and comfortable retirement for all.

This has led to the decision to further my knowledge with the necessary qualification to be able to answer difficult questions from prospective clients in such a way that they can understand and relate to the impact of their decisions in their own life and that of their immediate family.

I am a financial advisor affiliated with attooh specializing in Life and Disability Assurance, Risk Planning, Investment Savings & Planning, Healthcare Planning, Pre- & Post Retirement Planning, Short-term Insurance, Corporate Employee Benefits, Wellness & Vitality Benefits and Corporate Benefits.

The combination of my knowledge & my proficient team of support staff enables me to assist each and every client with the implementation of their holistic, personal plan during their financial journey. I do not merely sell products to clients, I create and implement a financial solution that is best suited to your needs and wants.



## CONTACT

### Website

[www.francisboersma.co.za](http://www.francisboersma.co.za)

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## QUALIFICATIONS

Wealth Management NQF 5 | 2014



## BUSINESS EXPERIENCE

Financial Advisor | 24 years



# DOES YOUR MONEY NEED A “PROFESSIONAL TRAINER”?

Financial planning is more than just numbers on a piece of paper. It's about your life – and what you want out of it. Do you understand where you are? Do you know what your financial goal is? How about the security of your family's future? Financial planning connects life with finance and evaluates the assets needed to help make a dream come true. We use financial tools to help us learn about your goals to offer guidance for every step of your journey in this unpredictable life.

## MY SERVICES INCLUDE



### INDIVIDUAL / FAMILY INSURANCE

- Life cover
- Disability
- Severe Illness
- Income continuation benefit
- Tax Free Investment/savings
- Retirement planning
- Educational savings



### BUSINESS INSURANCE

- Keyman Insurance
- Buy/Sell Agreements
- Contingent Liability



### PERSONAL BANKING



### HEALTH

- Medical aid
- Gap cover



### INVESTMENTS

- Local, guaranteed and offshore
- Retirement investments



### SHORT TERM INSURANCE

- Personal lines
- Commercial lines



### FIDUCIARY

- Wills and Estate
- Trusts



### EMPLOYEE BENEFITS

- Group Risk
- Retirement Funds
- Group Health Solution



### VITALITY REWARDS

- Wellness management
- Wellness days

Every client is unique and so is my process in my practice. Allow my team and I to create a personalised, tailor-made financial solution for you. My advice is based on your needs and wants and I will truly commit to your overall financial and holistic success. **Financial freedom could be your reality.**



## THE BUTTERFLY EFFECT

The butterfly with its metamorphosis - alludes to our lives as humans. Change is the ONLY constant. We celebrate growth, change and your own personal metamorphosis. We'll be there on the journey to guide and assist you toward a life of "permanent purpose".