



## WE SPECIALISE IN FINANCIAL PLANNING TO MEET ALL YOUR PERSONAL NEEDS

Having personalised financial planning for every stage of your life journey, ensures that you are covered in terms of unforeseen financial loss, in respect of dread disease, medical aid and gap cover and your retirement. Having the right life cover and estate planning also gives you peace of mind, knowing your loved ones will be taken care of financially, in the event of your passing.

At **OLEA South Africa**, we pride ourselves in being more than just a brokerage. We prioritise our clients' needs in every decision we make for them throughout their lives. We work with various insurance providers to offer the most suitable solutions for you. Our commitment to care and your financial peace of mind, never wavers.

Our comprehensive range of financial planning solutions is designed to provide financial security for every aspect of your life including unforeseen financial losses. We also provide the right coverage to ensure your loved ones are taken care of if you die.

We take a holistic approach and offer competitive pricing solutions for clients who have both life and non-life insurance through **OLEA**.

### Key areas of cover:

Our team of seasoned specialists offers tailored solutions in the following areas:

#### Personal Financial Planning

Life  
Cover

Dread  
Disease

Disability  
Insurance

Income  
Continuation  
Insurance

Retirement  
Planning

Local and Offshore  
Investments

Estate Planning,  
(Wills, Executorships  
and Trusts)

Medical Aid and  
Gap Cover

## Why choose us for your personal financial planning needs .....

At **OLEA South Africa**, we are dedicated to guiding you through every stage of your financial journey with personalised financial planning. Here's what sets us apart:

### Core Values

We believe in transparency, integrity and accountability, ensuring a secure and trustworthy partnership.



### Customised Solutions

Tailored financial services to align your investments and retirement plans with your unique goals and circumstances.



### Expert Advisors

Our team of experienced financial advisors offers valuable insights and strategies, to help you navigate complex financial landscapes.



### Comprehensive Wealth Management

Providing a holistic approach that includes investment planning, retirement income strategies, tax planning and estate planning.



### Client Education

Helping you understand your financial options so you can make informed decisions, which is key to achieving long-term financial success.



### Proactive Adjustments

Continuously monitor and adjust your financial plans in response to market changes and your evolving needs.



### Investment Optimisation

Focus on optimising your investments and protecting your wealth.



### Regular Communication

Regular communication, keeping you informed about your investments and discussing possible changes in your financial plans, ensuring you are involved and up to date in the decision-making process.



At **OLEA South Africa**, we're not just a brokerage, we're your partner in creating a secure and prosperous future for your business and your team.

## Our Team .....



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A South African Broker  
with an African Footprint

