



basik
FINANCIAL SOLUTIONS

wealth intelligence
made simple



An Authorised Financial Service Provider FSP 42041



who we are

- Black female empowered company.
- Established in 2009,
- Founded upon the principles of **professional excellence, passion, entrepreneurial acumen and integrity.**
- Fully licensed Financial Advisory and Intermediary Services business
- Provide a holistic approach to financial planning; with a strategic focus on **personal wealth creation, retirement planning** and the **development of simple financial literacy.**
- Thus, we strive to make our wealth intelligence so simple for you, that you'll feel confident to make smart and informed decisions - allowing you to achieve your financial goals and a secure future.

*We are ready to serve you with professional,
honest and unbiased advice*

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our services

wealth creation

- assess your financial position
- protect your income against unforeseen events i.e. death/ disability
- plan and save for future goals
- save for retirement
- make your money grow
- tax saving strategies
- plan for efficient distribution of assets at your death according to your wishes

retirement planning

- prepare for a secure retirement
- advise on suitable exit option
- retirement counselling
- cash flow planning
- tax saving strategies
- preserving your retirement capital
- estate planning & will drafting



our support services

Lifestyle Advice | Debt Management | Tax Solutions
Short Term Insurance | Medical Aid
Administration of Estates | Will Drafting





our partners

ALLAN GRAY


DO IT RIGHT



 Discovery

glacier
by Sanlam

 Sanlam


SYGNIA

 Investec


PRUDENTIAL

 **Hollard**
INSURANCE

momentum


CORONATION
TRUST IS EARNED™

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We will take the time to evaluate your set of circumstances and help you make decisions in your best interest so that you may make the most from the benefits from your hard-earned nest egg.