



**SOUTHWOOD**  
FINANCIAL PLANNING cc

## Corporate profile

Southwood Financial Planning, a Cape Town based financial planning practice was founded in 2001 for the client seeking a personal, independent and professional service to assist them in achieving their lifetime financial goals.

Southwood Financial Planning is an independent, fee-based practice providing well-researched and objective advice to individuals, families and small businesses. We believe that by also understanding our clients' needs, ambitions, aspirations and fears we are able to provide a unique and totally personalised service. Where necessary, we work in partnership with an established network of associates including accountants, lawyers, short-term insurers and investment professionals.

### Personal financial planning incorporates the following:

- Cash flow management and budgeting
- Risk management (life, disability, income protection and severe illness benefits)
- Health benefits
- Investment advice
- Retirement planning (including options on resignation and retrenchment)
- Estate planning
- Tax planning

### Business financial planning incorporates the following:

- Employee benefits
- Group schemes
- Business assurance (Buy-and-sell agreements, keyperson assurance and deferred compensation agreements)
- Succession planning

### Legal matters

- Business agreements
- Trusts
- Wills

Southwood Financial Planning (CK 2000/076826/23) is registered as an Authorised Financial Services Provider by the Financial Services Board, Licence No. 13566. Founding member: Lisa Hudson-Peacock CERTIFIED FINANCIAL PLANNER®