



# Johan Dippenaar

Executive Financial Adviser

Let me ride shotgun!

## MY COMMITMENT TO YOU

- ✓ Honesty of your planning and position.
- ✓ Integrity in all our discussions.
- ✓ Competence in our dealings.
- ✓ The most relevant available information shared with you.
- ✓ Enjoy the ride!

## QUALIFICATIONS & ACHIEVEMENTS

- BA Degree (UP)
- BD Degree (UP)
- CFP (UFS)
- 18+ Years' experience in the industry.
- Member of the Financial Planning Institute
- Liberty Financial Planner of The Year 2010
- Liberty VIP 3 Stars
- Liberty Top 35 Achievers Group (8 Years)
- Liberty Executive Financial Adviser (14 Years)
- Liberty Senior Financial Adviser (1 Year)

## GET IN TOUCH

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## Riding Shotgun!

In the old west, valuable goods and high net worth individuals were transported by stagecoach from one destination to another. An armed bodyguard, with a breakneck shotgun in hand, was called riding shotgun to ward off bandits and robbers while the coach driver was riding this coach to the destination of choice.

In our world today, you have a destination you have chosen for yourself and your loved ones. You are riding this stagecoach with care, compassion and diligence towards yourself and your family and loved ones. Every now and then bandits and robbers come along the way trying to claim your wealth and valuable goods you have worked so very hard to accumulate. In essence this can derail your journey or even end your ride!

Death, Taxes, Illness, Inflation, Market Events, and many other influences can have very negative effects on the destination of the journey and destination you choose, follow and ride. I want to ride shotgun on your stagecoach of life to ward off these bandits and assist you to reach your destination to a financial life well lived and travelled!

Let me ride shotgun!

## My Support Team



### FIDUCIARY SPECIALIST

Aletje van den Berg  
BCom, Business Management and Law; LLB; LLM (Estate Law);  
Practising Attorney; Member of the  
Fiduciary Institute of South Africa.



### TAX & ACCOUNTING SPECIALIST

Julio De Macedo  
Professional Accountant & Tax  
Practitioner (SA); (BCompt) Accounting  
Science; Member South African Institute  
of Professional Accountants.



### MEDICAL SCHEME SPECIALIST

Caylee Oosthuizen  
Licensed Medical Scheme Broker  
(Medical Schemes South Africa)



### SHORT TERM INSURANCE SPECIALIST

Maritsa Piek  
NQF5,  
Liberty Consultant since 2002



### COMPLIANCE OFFICER

Dean Mans



### PERSONAL ASSISTANT

Debbie Raubenheimer

“Passionate about people and their welfare, Johan and his team takes ownership wrapped in responsibility while forging long-term relationships based on sound advice. Meticulous attention to your needs and aspirations, coupled with a sense of urgency and service encompasses his practice’s values, all accentuated by a deep-seated understanding of the importance of family.

## About Insurance & Wealth Creation Professionals (IWCP)

**Our Insurance and Wealth Creation Professionals focus on making your dreams a reality by making the complex decisions around Financial Planning simple. We ensure your legacy is protected and your wealth preserved for you and those you love most.**

Insurance and Wealth Creation Professionals (IWCP) is a Liberty Affiliate that is leading the way for the new Generation of Financial Planners. Our core purpose is to help change South Africa one policy at a time backed by sound professional Financial Advice.

IWCP was established in 2019 with the merger of two well established Liberty Affiliates, Combined Life and Cradle House, who have been successfully operating for more than 20 years. The wealth of experience and new leadership in IWCP creates a unique blend of old school values with innovative thinking.

## What We Do For Individuals

**At IWCP we focus on making your dreams a reality by making the complex decisions around financial planning simple. The IWCP Client Financial Wellness Dashboard is at the centre of this process.**

We understand the importance of family. Have you noticed pensioners walking on the beach looking internally happy, traveling regularly and not having any worries about spoiling their grandkids? That is because of what we do. Have you noticed that some widows are given time to grieve without financial stress as they know their life style and family is not financially impacted by their massive loss? That is because of the plans we put in place. Have you noticed that some people manage to do amazing things by working through their bucket list? That is what we do, we make dreams a reality!



WEALTH PROTECTION



WEALTH CREATION



ESTATE PLANNING



WEALTH PRESERVATION

## What We Do For Businesses

**The IWCP Employee Benefit Specialists designs customised value added services & communication propositions for every company's unique needs to build better workplaces.**

Why are Employee Benefits & Umbrella Funds important for your business? In order to build a sustainable business, companies need to attract talent, then do whatever it takes to retain them. The company benefits in many cases are the differentiator. Socially responsible companies further pride themselves knowing that in the unforeseen events of life their employees are covered. This allows your employees to live their lives with the knowledge that their financial future is secure and their families are financially protected. Participating employers, whether small or large, can get traditional big company benefits without the hassle of setting up their own stand-alone retirement funds.



RISK SOLUTIONS



INVESTMENT OPTIONS



LIBERTY VALUE ADDED SERVICES



IWCP VALUE ADDED PARTNERS

## Liberty in Numbers

11 000

ADMINISTRATING OVER 11 000 RETIREMENT FUNDS AND RISK SCHEMES

R40 BILLION

MANAGING OVER R40 BILLION IN ASSETS FOR INSTITUTIONAL CUSTOMERS

R18.8

MILLION IN CLAIMS PAID EVERY WORKING DAY

1st COMPANY TO

LAUNCH A RETIREMENT ANNUITY, LAUNCH A UNIT TRUST, PUBLISH ITS CLAIMS STATS

27 878 400

SQUARE FEET LIBERTY OWNS THE RICHEST SQUARE MILE IN AFRICA, SANDTON CITY



LIBERTY