

CARMEN VENTER now

# Synergia

## LEARNING



Approved 2019 FPI19060064

QUALIFIES FOR  
3 CPD POINTS

Partnering with professionals to discuss, foreign assets on death, Domicile Act : marriage and death, retirement funds on divorce:accrual.

Our guest speaker, Alex Cook, will discuss going digital: how technology can be used to improve client-planner relations, grow a planner's business and add value to a client by improving the way they engage with their finances.

If there are pressing issues that you would like us to discuss now or in future workshops, we will gladly accommodate.

**Date:** 12 July 2019  
**Time:** 8:30 am for 9:00 am until 1:00 pm  
**Venue:** The Venue Melrose Arch  
**Cost:** R950  
Eats and beverages will be provided

**Reserve your seat before 5 July 2019**  
**Registration form below**



Carmen Venter  
CERTIFIED FINANCIAL PLANNER®  
professional  
Fiduciary Practioner of SA ®  
Master Tax Practioner (SA)™



Alex Cook  
Group CEO GCI group  
CERTIFIED FINANCIAL PLANNER®  
professional

# ENGAGING WITH PROFESSIONALS

**We engage with financial services professionals on complex client situations where expert knowledge and research is required.**

**We offer hourly rates or retainer options.**

## **Two examples of the situations we have dealt with**

Does having offshore investments really require a foreign will?

How would you handle a key person/buy and sell policy that is payable to a company/partner that is being wound up/estate being liquidated?



# EDUCATING CURRENT AND FUTURE PROFESSIONALS

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## Current

1. Workshops
2. CPD activities
3. Engaging with professionals on complex client scenarios and topics.

## Future

1. Assistance with NQF level 8 studies.
2. Professional competency exam skills.
3. Workshops

We have a range of topics that include and go beyond professional competency exam requirements and can develop and offer specialised training according to the professional's needs. Our complex case studies are based on real clients. We also consult with professionals on very complex clients.

All of the above can be tailor made depending on the experience level of the professionals and will be CPD approved. We offer online and face to face programmes.



# WHO IS SYNERGIA LEARNING?

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## Our team

### Carmen Venter

CERTIFIED FINANCIAL PLANNER® professional  
Fiduciary Practitioner of SA®  
Master Tax Practitioner (SA)™  
HDIP TAX PGD TAX



### Roxanne van Blerk

CERTIFIED FINANCIAL PLANNER® professional  
MCom specialising in Financial literacy



## Vision

We are passionate about education, not only focussing on the knowledge learned but also the application thereof. We believe that through our educating and engagement approach, we will help build practices and their professionals in the financial services field.

## Offering

- Workshops
- Live webinars
- Consulting services
- CPD approved providers with the FPI
- Online modules

WE WOULD LOVE TO HEAR FROM YOU AND PARTNER UP TO HELP CREATE  
HIGHLY SOUGHT AFTER PROFESSIONALS.



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Roxanne van Blerk:  
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# REGISTRATION FORM

NAME:
CELL NO:
EMAIL:

CERTIFICATE OF ATTENDANCE REQUIRED	YES	NO
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