



# OUR VISION YOUR FUTURE

We have pioneered breakthroughs and have broadened our enterprise

We have a solid business model a expanding market, and a vision todemystify the Savings and Investment process.

Join our Network of Independent Financial Planners and lets grow together.



# CACTUS PLANNING NETWORK

## CONTACT US

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Corporate Business

# WHAT DO WE OFFER

- We are a Financial Planning and Retirement Strategy practice and primarily offer the following services to our network members
- PRACTICE MANAGEMENT Relationship Manager
- COMPLIANCE SUPPORT - Legal Structures, Licensing
- MARKETING SUPPORT - CRM
- OPERATIONS - Setup
- FINANCE SUPPORT Capital Sourcing
- TECHNOLOGY SUPPORT
- COMMUNITY - Partner Workshops

# OUR PEOPLE

Being a Financial Planning and Retirement Strategy service. We seek to maintain the minimum level of knowledge and skills for the industry. Our people are members of the CISI - Chartered Institute for Securities and Investments, a Global membership organisation for Securities and Investment practitioners. We require all our people to sit and pass CISI Professional exams and CPD Technical units annually.



# OUR CLIENTS

Our clients are drawn from the following categories:

- INDIVIDUALS
- FAMILIES
- PROFESSIONALS
- GROUPS
- CORPORATE ORGANISATIONS

