



:::KALSIM BUSINESS PROFILE:::



Taking care of all your insurance needs...



INSURANCE SERVICES

INTRODUCTION

Kalsim Investments was established with a vision of being the first choice for our clients by providing a professional service that embodies our client's needs through comprehensive financial planning, care and efficiency.

We are a black woman owned enterprise and pride ourselves on going the extra mile and paying attention to detail.

OUR MISSION

- To establish and maintain long-term working relationships with clients and providers
- To walk alongside our clients as they methodically attain their financial goals
- To provide a comprehensive, professional and efficient service to our clients
- To continuously upgrade, train and retain staff, and provide our clients with financial education so that they can grow their wealth.
- To maintain our commitment to social responsibility within the community



We specialise in:

- Financial planning
- Retirement planning
- Estate planning
- Short term Insurance

INCORPORATING:

- Commercial and Domestic Short Term Insurance
- Individual Life Insurance
- Health Care
- Investments
- Group Life Insurance
- Employee Benefits

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SERVICES

- Kalsim Investments is an Authorised Financial Services Provider with extensive experience in the personal and business arenas. We add value by offering a professional service, structuring comprehensive financial plans and paying attention to client's financial needs and long term goals.
- We are trained Certified Financial Planners qualified to provide and conduct a professional needs analysis, and advise clients within the ambit of the contractual mandate.
- We employ the consultative services of a pension fund's analyst who monitors growth in our corporate client's pension funds and group risk. Our employee benefits consultant has trained as a certified financial planner and has extensive knowledge and experience as an employee benefits specialist.
- We have established relationships with qualified risk managers who specialise in commercial risk assessment, thus enabling us to advise our clients correctly and tailor their commercial short term insurance to suit each clients particular needs. We continuously align our clients needs and their goals with the correct investment vehicle in order to expand their Asset base and grow our clients wealth over time.
- We have staff members particularly dedicated to short term claims, thereby rendering our clients a fast, efficient and favourable conclusion to claims. As a value-added service, we review our commercial client's corporate risk on a quarterly basis, thus ensuring that they remain covered and their changing needs are addressed.
- We are authorised to provide health care advice by the Council of Medical Schemes and have relationships with the major Medical Aid Providers in the country.



INVESTMENT

CORPORATE RESPONSIBILITY

We are aware of the community in which we operate and as such we strive to support selected charities. We endeavour to reduce our carbon footprint by conserving paper and recycle all waste. Our trained professionals provide fundamental financial literacy workshops so that people know their rights, who they can complain to and how they can overcome their financial challenges.

CONCLUSION

At Kalsim we provide you with the best options to ensure the best financial decision is made. Although Kalsim Investments is a small 100% black women owned business, operating in a male dominated space, we aim to be the first choice for women and men from all walks of life, seeking financial advise, education, financial products and intermediary services.

Our promise:

We will walk alongside you and strategically assist you in achieving your financial goals.



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CONTACT DETAILS



INSURANCE SERVICES

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