








Our Wealth Needs

PRIORITIES	POTENTIAL NEEDS	
Build The Business	 <ul style="list-style-type: none"> <input type="checkbox"/> We require a day-to-day transactional bank account <input type="checkbox"/> We are thinking of buying property and/or other assets and require financing <input type="checkbox"/> We do business outside the country and have a need for offshore banking <input type="checkbox"/> We import and/export products and require trade finance <input type="checkbox"/> We trade cross-border and require access to Foreign Exchange 	 <ul style="list-style-type: none"> <input type="checkbox"/> We would like to offer benefits and protection to people in the business should they become incapacitated and unable to work
Run The Business	 <ul style="list-style-type: none"> <input type="checkbox"/> We require a business account & credit card for day-to-day transactions <input type="checkbox"/> We are planning to buy vehicles and/or other assets in the near future and would require financing <input type="checkbox"/> We require an overdraft facility <input type="checkbox"/> We would like a revolving credit facility with immediate access to funds <input type="checkbox"/> We would like to improve cash flow and are interested in invoice discounting <input type="checkbox"/> We do business with Chinese stakeholders and are interested in the African China Business Center <input type="checkbox"/> We would like to finance the payment of our non-life insurance premiums <input type="checkbox"/> We trade cross-border and require access to Foreign Exchange 	 <ul style="list-style-type: none"> <input type="checkbox"/> We are interested in a group retirement scheme for our employees <p>H</p> <ul style="list-style-type: none"> <input type="checkbox"/> We are interested in providing medical insurance for our employees <input type="checkbox"/> We have business assets or operations that we would like to insure, including: <ul style="list-style-type: none"> o Corporate travel o Agriculture o Marine and fleet o Motor vehicles o Fidelity Bond
Grow The Business	 <ul style="list-style-type: none"> <input type="checkbox"/> We would like to invest funds while having immediate access to it <input type="checkbox"/> We would like to invest money for a fixed period of time and earn a fixed return (rate) on it <input type="checkbox"/> We are interested in investing offshore <input type="checkbox"/> We would like the bank to hold our financial securities on our behalf 	<p>STANLIB</p> <ul style="list-style-type: none"> <input type="checkbox"/> We would like to invest for specific long- and short-term goals <input type="checkbox"/> We are interested in property asset management <input type="checkbox"/> We are interested in exploring private equity and alternative investment opportunities
Impact The World	 <ul style="list-style-type: none"> <input type="checkbox"/> We would like to invest in equities and securities in order to save for specific corporate responsibility initiatives <input type="checkbox"/> We are interested in investing offshore 	<p>STANLIB</p> <ul style="list-style-type: none"> <input type="checkbox"/> We would like to invest for specific goals linked to our corporate responsibility initiatives <input type="checkbox"/> We are interested in property asset management as part of fulfilling some of our corporate responsibility initiatives <input type="checkbox"/> We are interested in exploring private equity and alternative investment opportunities
Protect The Business	 <ul style="list-style-type: none"> <input type="checkbox"/> We are interested in providing group funeral insurance and/or group life insurance to our employees <input type="checkbox"/> We would like to take out life cover for our business owner(s) and potentially for their spouses 	<p>H</p> <ul style="list-style-type: none"> <input type="checkbox"/> We would like to protect our business from possible liabilities payable from incidents which occurred during the course of, or in connection with, our business <input type="checkbox"/> We would like to make sure the business, assets and key personnel are protected against unforeseen events <input type="checkbox"/> We would like to take out insurance cover for our crops and/or livestock

NAME: _____

COMPANY NAME: _____

CONTACT DETAILS: _____

SECTOR AND INDUSTRY: _____

NUMBER OF EMPLOYEES: _____