

# Why Siepp



Life is a journey filled with risk. You need skilled guidance advising you how to transfer potential risk, ensuring peace of mind as part of a fulfilled life.



 Powered by Third Age Group

Financial Services Provided by Authorised Financial Services Providers



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# About

## US

At Stepp, we understand risk and we are always looking for experienced relationship managers who specialise in risk management and insurance essentials. We are always on the lookout for vibrant brokers who share our vision and core values. If your brokerage is looking for new opportunities to grow, we can help you to take a Stepp in the right direction. When becoming a part of the Stepp community, your brokerage will experience incredible increases in profitability, through our unmatched business mentorship, strategic management and guidance. Take a Stepp towards business success today!

# OUR Vision & Mission




Our vision is to embark on a trust journey by establishing relationships built on trust, confidence, ethical and honest wisdom.


At Stepp, we understand that shouldering your responsibilities is often daunting because you are handling what is dearest to you: your future and the future of your loved ones. We also understand that risk is unavoidable, but we aim to eliminate the fear associated with risk by providing you with skilled guidance on how to effectively transfer your risk. We aim to take care of all your necessities in life, so that you can have the peace of mind that your risk has been placed in the hands of specialists you can trust, thus commencing our trust journey together.




1996  
Third Age Group Established 

2009  
Stepp Lingenfelder 


2016  
Stepp Veritas 

2017  
Stepp Credo 


2018  
Stepp Truck & Cargo 


2019  
Stepp Engage 


2019  
Stepp Winelands 

2020  
Stepp Infinity 


2021  
Stepp Westcoast 

2022  
Stepp Trinity 

2022  
Stepp Namibia 

2023  
Stepp Pluma 


2024  
Stepp Parakletos 


 2005  
Stepp Consult

 2009  
Personal & Commercial Financial Advisors


 2016  
Stepp Asset Management


 2018  
Stepp Bella Rosa | Stepp Bestbier

 2018  
Stepp Philren | Stepp Veyron

 2019  
Stepp Devotion


 2019  
Stepp Durbanville

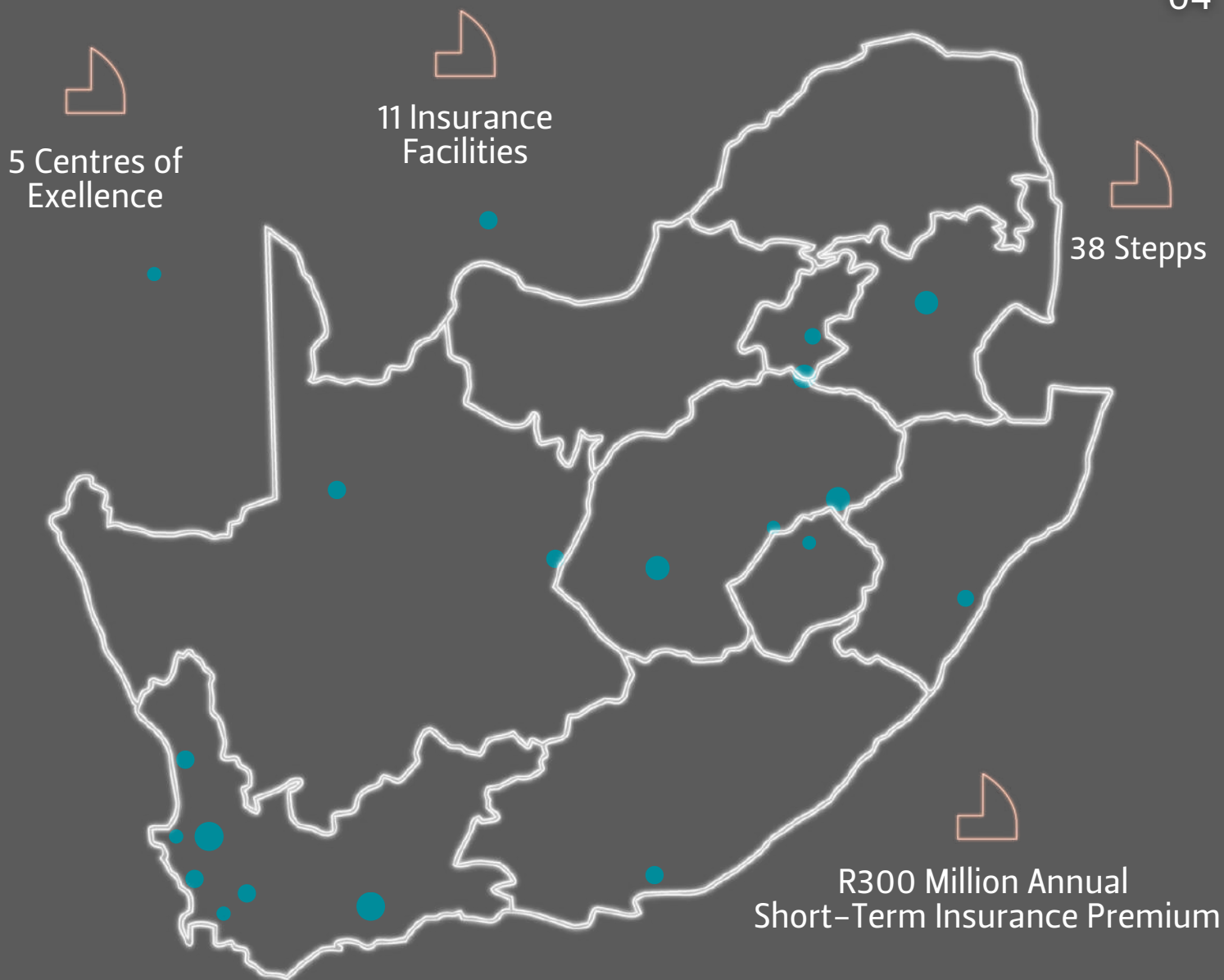
 2020  
Stepp Jordaan

 2021  
Stepp Phoenix

 2022  
Stepp Cura

 2022  
Million Bux Versekeringmakelaars

 2023  
Stepp Finhub



## National Brand

We took the first Stepp towards success and left a National footprint. Stepp has grown significantly over the years, and we plan to continue growing. We have offices across the Nation and by joining Stepp, you will become a part of an ever-growing, vibrant and dynamic brand. As part of the Stepp community, you will experience a sense of belonging where relationships are built on trust, confidence, ethical & honest wisdom.

### YOU GET ACCESS TO:

- ↳ An excellent finance, HR and legal team
- ↳ Economies of scale which allows collective bargaining
- ↳ A unique business philosophy
- ↳ Succession planning
- ↳ Buying power
- ↳ Higher profitability for your business.

# UNIQUE Business model

## **Entrepreneurial flair**

Allow for own business feel and decisions within the Stepp framework and retain your own business culture in line with the Stepp core values. Unique to our model is the strong encouragement to maintain, develop and grow each individual's independence and entrepreneurial flair yet offering the convenience, benefits and comfort of a corporate environment.

## **Growth opportunities**

Here at Stepp, there are numerous opportunities to grow as we have the necessary resources available. We also exploit cross-selling within the group, have bargaining power with suppliers, the Stepp marketing portal, websites and social media which ensures an incredible digital presence, access to funding for acquisitions and we are innovative and have a unique way of generating leads.

## **Strategic planning/guidance**

Setting realistic and achievable medium-term goals and targets with the help of SWOT analysis. Strategic planning/guidance will ensure that all goals are met and that you always stay one stepp ahead of the game.

## **Financial management/control**

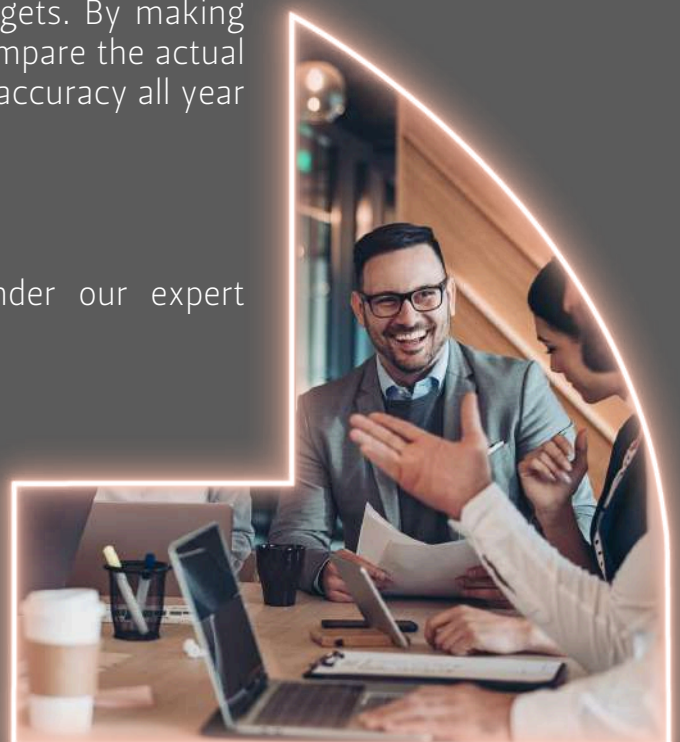
When it comes to annual budgets, you will learn how to prepare budgets, as well as how to stay within these budgets. By making use of Monthly Management accounts, you can compare the actual figures to the set budget, which ensures complete accuracy all year round.

## **Independence**

Here at Stepp, we encourage independence under our expert guidance and within the Stepp framework.

## **Business mentorship**

Move from being just a brokerage to a business by gaining access to expert wealth of experience.



## **Increased profitability**

When working with Stepp, you have the benefit of shared costs within the group in terms of HR, training and marketing, this means that you are not solely responsible for all these costs. This way, your profits can increase exponentially.

## **HR**

When working with Stepp, you will gain access to the HR department for recruitment and other processes, training on Stepp Academy, Shadow Match for behavioral patterns, the Skills Grid which will determine gaps in technical skills, career development, skill development, employment equity and a plugin solution to policies and procedures.



## **Succession planning**

At Stepp, we pride ourselves in having proper processes in place for if something were to happen to one of the business partners, e.g. death or retirement. This is just another way that we are innovative and flexible in our approach to business.

## **Exit strategies**

If you ever were to feel uncomfortable for any reason, we have incorporated a model which allows for people to exit. This model can be used by people who would like to exit even before retirement.

## **IT/CRM management**

When working with Stepp, you will gain access to incredible integrated IT and CRM systems, which will make the running of your business as seamless and efficient as possible. In addition, you will also gain access to secured virtual backups systems, which means that no work will ever be lost.

## **Access to suppliers and investment platforms**

When working with Stepp, you will gain access to suppliers, even where you do not have a contract. Risks can also be spread amongst partners. You will also gain access to Stepp's model portfolios.

# OUR Core Values

## **1. Trust journey**

Start your journey with us, take the step and our fresh and innovative guidance will result in a trust journey.

## **2. Utmost good faith**

At Stepp, it is our belief in our ability that gives us the confidence to ask you to allow us to help advise you on your risk. Knowledge really is power, and power is what provides us with the capacity to anticipate events and take the necessary Steps to keep you out of harm's way.

## **3. Highly skilled, excellent & knowledgeable advice**

At Stepp we understand risk and our experienced representatives will guide you every step of the way with wide ranging expertise in risk management and insurance essentials.



## **4. Unique relationships through visionary solutions towards financial fulfillment**

As part of the Stepp community, you will experience a sense of belonging where relationships are built on trust, confidence, ethical and honest wisdom.

## **5. Passionate about our valued Stepp community - Family, staff, clients, business partners and suppliers**

We are passionate about our clients, community members, business partners and suppliers and they all trust us because they know that we understand risk and that we care about each individual. Our ethical and honest wisdom is built on decades of experience.





**OUR**

## Unique Business Philosophy

AT STEPP, we pride ourselves on our UNIQUE BUSINESS MODEL which has allowed vibrant brokers who share our vision and core values, to transform into successful business's with fantastic growth opportunities and exponential increases in profitability through our unmatched business mentorship, strategic management and guidance, while implementing strong and exciting financial management and control systems and access to funds for growth.

It includes assistance in human resources and industrial relationships through our support staff, the use of various support mechanisms such as our own online academy, measuring of behavioral patterns and skills grid. All this is done while we offer increased access to suppliers, networking and lead generation and cross-selling to our valued partners through our unique marketing and sales techniques.

Our model includes a uniquely integrated IT & CRM system which will undoubtedly provide an advantage in the market.

The model includes exciting and innovative succession and exit strategies. Unique to our model is the strong encouragement to maintain, develop and grow each individual's independence and entrepreneurial flair, yet offering the convenience, benefits and comfort of a corporate environment.

# Conclusion

## & CLOSING



Your brokerage's journey towards increased profitability, more opportunities and optimal growth starts here.



Are you ready to take a Step towards business success with us today? Because we are ready and able to embark on a trust journey with you and your business.

# Stepp

## Contact

### US

**Tel:** +27 51 407 0801

**Email:** [info@stepp.co.za](mailto:info@stepp.co.za)

**Address:** 75 Lavender Lane, Somerton Estate, Bloemfontein, 9301

**Website:** [www.stepp.co.za](http://www.stepp.co.za)

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