

# SA PLAN COMPANY PROFILE

SA Business Planning t/a SA Plan  
2016/509181/07

30 North Street,  
Glen Marais  
Kempton Park



SA PLAN

10-Year Maintenance  
Planning Made Easy

[www.saplan.co.za](http://www.saplan.co.za)

Established 2016

# 2024





CEO - Dieter Zimmermann

## COMPANY OVERVIEW

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### About Us

SA Plan is the leading long-term planning solutions provider in South Africa, dedicated to empowering trustees, portfolio managers, and Sectional Title property owners with comprehensive and tailored 10-Year Maintenance Plans. With our expertise and experience, we offer a range of services, including the Standard 10-year plan in PDF format as well as an innovative DynaPro option, featuring an electronic plan accessible via the user-friendly DynaPro Portal. Our commitment to delivering exceptional support ensures that clients receive the guidance they need to make informed decisions and achieve their long-term goals. Choose SA Plan as your trusted partner and discover a world of planning excellence, backed by a team devoted to your success.

# OUR FUTURE

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## Mission

At SA Plan, our mission is to empower portfolio managers, and trustees with comprehensive and innovative long-term planning solutions. We are committed to providing expert guidance and support, enabling our clients to make informed decisions that lead to sustainable growth and long-term success.

## Vision

Our vision at SA Plan is to be recognized as the industry's premier planning solutions provider. We strive to be at the forefront of innovation, delivering cutting-edge tools and services that cater to the unique needs of our clients. By fostering lasting partnerships and maintaining an unwavering dedication to excellence, we aim to be the trusted choice for managing agencies seeking transformative planning strategies.



# COMPANY VALUES

At SA Plan, our values form the very core of our identity and guide every aspect of our operations. Integrity is paramount in all our interactions, as we believe in honesty, transparency, and ethical conduct. We are dedicated to excellence, continuously striving to deliver superior planning solutions that exceed expectations. Collaboration and teamwork are deeply ingrained in our culture, fostering a supportive environment that encourages innovation and collective growth. Client-centricity lies at the heart of our approach, as we listen attentively to our clients' needs and tailor our services to ensure their success. Lastly, we embrace adaptability, staying ahead of the curve and embracing change to provide cutting-edge solutions in an ever-evolving landscape. These values, embodied by our passionate team, drive us to create enduring partnerships and remain a trusted and reliable ally for our valued clients.





## WHAT WE DO



**Comprehensive 10-Year Plans:** Our tailored solutions cater to diverse needs, delivering strategies for enduring success and growth.



**Innovative DynaPro Platform:** Accessible through our dynacom portal, our electronic plans come with downloadable reports for informed decision-making.

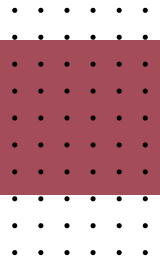


**Insurance Replacement Valuation Reports:** Our accurate valuations ensure your assets are well-covered, providing peace of mind and protection.



**Expert Guidance and Support:** Our skilled planning specialists provide dedicated assistance, guiding you every step of the way.

# BUSINESS OVERVIEW



## Core Values

Our core values: Integrity, client-centricity, collaboration, and excellence. Trustworthy partner, tailored solutions, teamwork, and exceptional service. Empowering clients, fostering relationships.

## Partners

SA Plan thrives on strong partnerships, collaborating with industry leaders and strategic allies to deliver innovative planning solutions and empower client success.



## Reach

SA Plan's services reach clients throughout South Africa, spanning various industries such as Residential, Retail, Commercial, and Industrial. We cater to Managing Agencies, Portfolio Managers, Trustees, and property owners in Sectional Title and Home Owners Associations. With our extensive network and expertise, we are dedicated to supporting our clients' goals, ensuring excellence in planning solutions across the country.



# MANAGEMENT TEAM

SA Plan's management team, led by CEO Dieter Zimmermann, has over 40 years of collective experience in property management, construction, civil engineering, project management, financial management, and communication. Our dynamic team includes Operations Manager Cherize, Quantity Surveyor Adriaan, Marketing expert Anrich, and skilled assessors from different provinces. Together, we are dedicated to delivering exceptional planning solutions and empowering client success.

## CLIENT PORTFOLIO

We currently have 300+ Managing Agents and 800+ Portfolio Managers on our books. More than 100K owners have benefitted from our comprehensive 10-year Maintenance Plans throughout Sout Africa



And many more ....

OBJECTIVE || AFFORDABLE || RELIABLE



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