'independent
wealth managers

To invest successfully over a lifetime does not require a stratospheric IQ, unusual business insight, or inside information. What's needed is a sound intellectual framework for making decisions and the ability to keep emotions from corroding that framework.

Preface by Warren Buffet in the Intelligent Investor by Benjamin Graham

OUR APPROACH

INTEGRATING AND OPTIMISING YOUR FINANCIAL LIFE TAKES THE GUIDANCE OF ATTENTIVE, TRUSTED WEALTH MANAGERS.

Accountable professionals that will focus on creating long-term wealth based entirely on your unique circumstances.
This is Independent Wealth Managers.

You will find our highly personalised approach ensures that we gain an in depth understanding of your financial objectives, a necessity to navigate you in what has become a complex, ever-changing economic landscape.

Your objectives, risk appetite and financial situation are key factors that we consider in ensuring our professional and bespoke services meet the requirements of your financial profile.

OUR CLIENTS

- High net-worth individuals
- Entrepreneurs
- Professionals
- Business owners
- Private companies
- Partnerships
- Trusts

OUR PEOPLE

Our heritage dates back to 2003, when we were established in Durban, KwaZulu Natal. Expanding ourselves and our business purpose, today we advise an affluent base of clientele residing and conducting business throughout South Africa and abroad.

Our team has been hand picked for their industry experience, professionalism and commitment to service-excellence. All our advisors are experts in financial planning and are members of the Financial Planning Institute of South Africa (FPI) and are CFP® professionals.

Our clients find comfort that our team-based approach delivers a unique blend of specialist skills linking financial planning, tax efficient structuring and management of worldwide assets.

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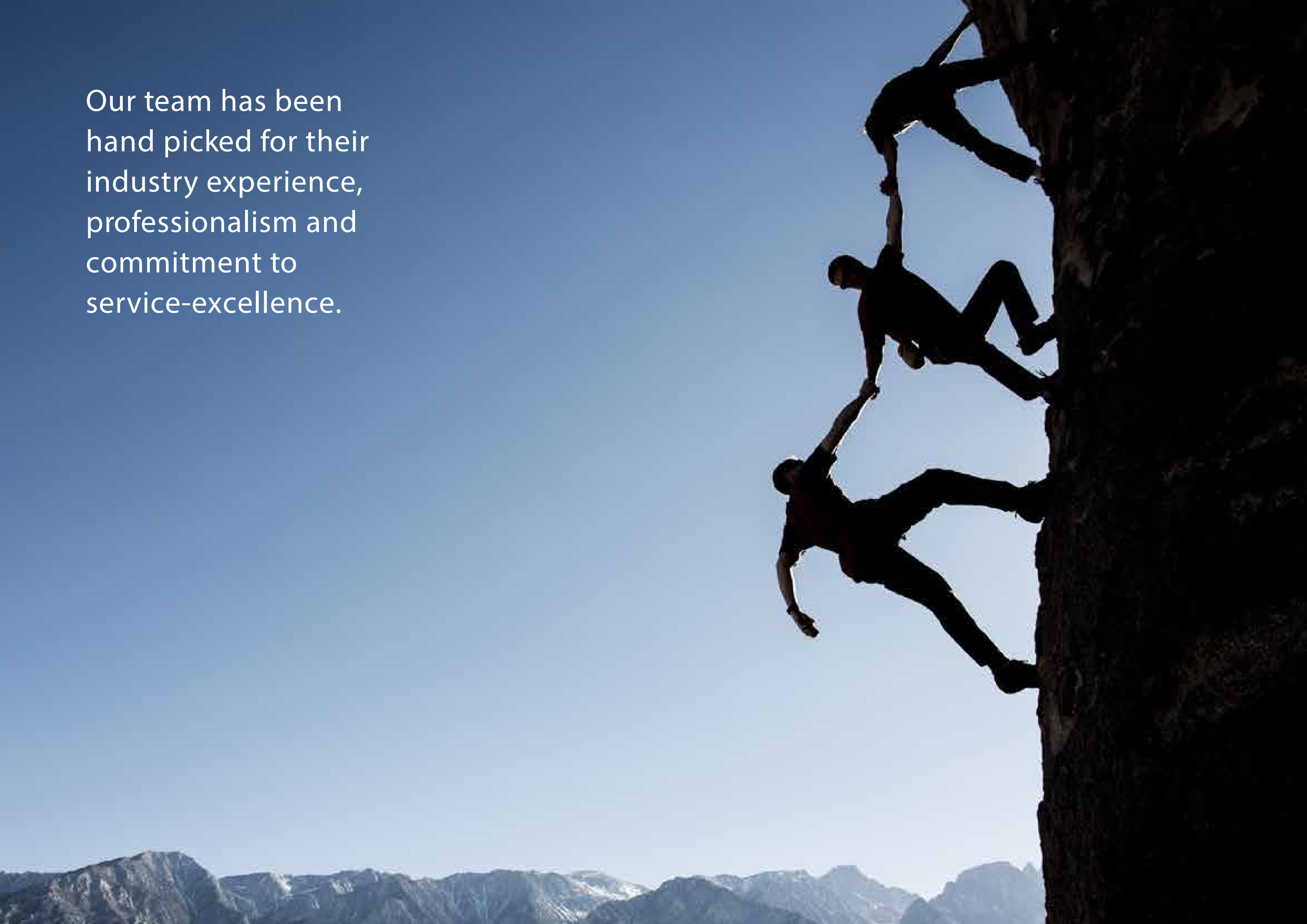

OUR ROLE


ADVISOR
Diagnosing complex issues
Implementing solutions
COACH
Accountability
Direction
Progress
WEALTH MANAGER
MENTOR
Feeling of:
Comfort
Reliability
Care
EDUCATOR
Ongoing eduction and communication

OUR COMMITMENT

Everything we do is focused on your success. We spend a great deal of time developing relationships with our clients that are entrenched in trust, honesty and integrity.

WE ARE RESEARCH-DRIVEN
Our advice is always backed by thorough analysis and due diligence.

WE ARE FEE-SENSITIVE
We understand that fees can have a major impact on financial outcomes.

WE TAKE YOUR WEALTH MANAGEMENT PERSONALLY
Our pledge to you is ongoing personal care and regular interaction.

WE ARE INDEPENDENT
Not being aligned to any financial services provider means we are able to provide you with unbiased and unrestricted scope of advice.

WE ENSURE RELEVANCE
To keep your plan current we engage with you in regular personalised reviews

WE ARE TRANSPARENT
We communicate advice with clarity and impartiality. We do this to ensure that you are able to make informed decisions.

WE GUARANTEE CONFIDENTIALITY
Your privacy, as well as the security of any information shared is of paramount importance to us.

WE KEEP YOU INFORMED
Our review sessions will provide you with exclusive market updates from investment portfolio managers. In addition, our newsletter, The Independent, will constantly keep you up-to-date with articles of interest and relevance.

OUR SERVICES

Together with our clients we prepare a comprehensive, individually formulated wealth management strategy.

A strategy that is not just about investments but also ensures that your business and personal interests are aligned.

INDIVIDUALS AND FAMILIES

BUSINESSES, TRUSTS, PROFESSIONALS AND ENTREPRENEURS

Future Plans and Goals	Life Goals Establishment	Values and Expectations	Understanding Behaviour Biases	Optimise your Savings
Helping and Protecting Family	Life	Critical Illness	Disability	Business Continuity
Creating FInancial Comfort	Risk Tolerance	Income and Cash flow Planning	Liquidity	Retire your way
Protecting and Enjoying Lifestyle	Investment Services	Portfolio Construction	Manager Selection	Tax Planning
Building a Legacy	Wills and Trusts	Estate Preservation	Wealth Transfer	Estate and Tax Planning

It has been said that the reason most people never reach their goals is because they do not define them, or ever seriously consider them as believable or achievable. Winners can tell you where they are going, what they plan to do along the way, and who will be sharing the adventure with them.

Together let's embark on the journey.

OUR DETAILS

HOLDING COMPANY
Independent Wealth Managers (Pty) Ltd
Directors: M I Attridge, G W Hill
Reg no: 2003/023709/07
VAT Number: 4830208494

SUBSIDIARY COMPANY
Independent Wealth Managers (Advisory) (Pty) Ltd
Directors: M I Attridge, G W Hill, S B Matthews
Reg no: 2008/014780/07
VAT Number: 4870257682

AUTHORISED FINANCIAL SERVICES PROVIDER NUMBER
3145

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