



Affluence

CAPITAL

Personal Financial Services Offered:

GLOBAL PORTFOLIO MANAGEMENT

- Professional management of various securities (shares, bonds, ETF's, CFD's)
- Retirement annuities
- Unit trust, local and offshore
- ETF (local and offshore)
- Online securities (local and offshore)

RISK MANAGEMENT & INSURANCE PLANNING

- Life cover
- Disability cover
- Critical illness cover
- Functional impairment

RETIREMENT PLANNING

- Provision for retirement such as annuities, provident- and pension funds
- Preservation of retirement funds
- Post retirement options such as living annuities and life annuities
- Pension preservation funds
- Provident preservation funds
- Tax-free investments

MONEY MARKET SOLUTIONS

- Fixed deposit accounts
- Call accounts
- Money market accounts
- We arrange the issuing of guarantees and financing for clients with a share portfolio

BUSINESS INSURANCE

- Keyperson insurance
- Buy and sell insurance
- Loan redemption plans

EMPLOYEE BENEFITS

- Umbrella Retirement funds (Pension and Provident Funds)
- Group cover in the event of death and disability

FUDICIARY

- Drafting of Wills
- Administration of Deceased Estates
- Structuring affairs across jurisdictions (local and offshore)
- Formation of Trusts
- Trust administration (local and offshore)