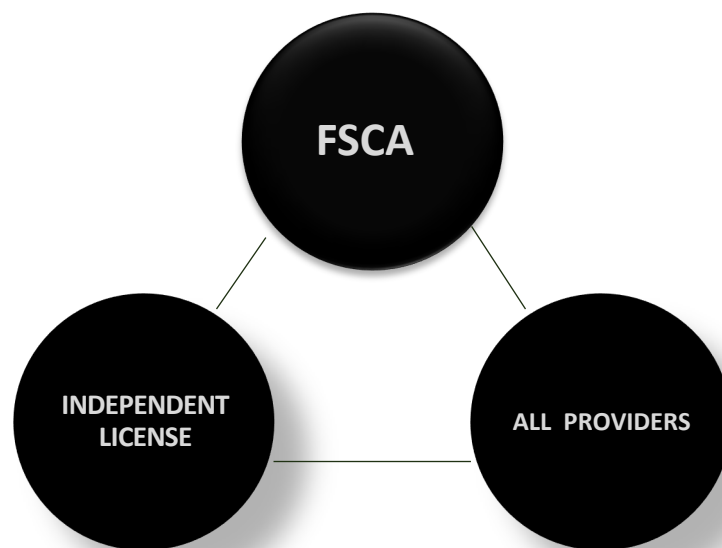






XPert Wealth (Pty) Ltd (2014/259028/07) is a 51% Black woman owned Independent Financial Services Provider, registered with the Financial Services Conduct Authority (FSP 51670) and The Council for Medical Schemes (ORG 50546) that, as an organisation, embodies the following elements.



License categories:

- Short term insurance Personal Lines
- Short term insurance Personal Lines A1
- Long term insurance sub category B1
- Long term insurance sub category B2
- Long term insurance sub category B2 – A
- Long term insurance sub category B1 - A
- Long term insurance sub category C
- Retail pension benefits
- Short term insurance Commercial Lines
- Pension Funds
- Shares
- Debentures and securitized debt
- Health Service Benefits
- Long term deposits
- Short term deposits
- Structured Deposits
- Participatory interest in a hedge fund
- Participatory interest in a collective investment scheme

ABOUT US

1.

A proven track record and service delivery model with more than 85 years combined Financial and Legal experience.

2.

Independent Financial Advisory firm that offers a complete bespoke suite of advisory services in the Retirement Insurance, Asset Management, Health-care and Investment Sector for inter-alia, Private Companies, Public Sector Organisations and Individual Clients.

3.

Continuity of expertise development through Financial Development Programs supporting well trained staff.

4.

Technology integration and innovation - IT Development in the forefront with unique Data and CRM support (App support and design).

5.

Continuity of Quality of service, guided by the FSCA principles.



WHAT MAKES US DIFFERENT

- We are fully independent and therefore manage the Three Silo's, i.e. Administration, Risk and Investment independently and transparently by avoiding "Dipping" and preventing companies having control over the Three Silo's, we ensure companies do not manage these aspects as one.
 - We remove the cross-subsidisation from insurance companies within the Three Silo's as it allows us, on renewal date, to price the Silo's independently with differences in cover to the benefit of members.
 - Our reputation for compliance, administration and governance, reliable support and our pledge in Building Wealth and Prosperity for every client, employee and their dependents.
 - We provide innovative and cost-effective solutions for Corporate Clients and their Employees through our unique XPert platforms, our technological systems and industry leading insurer/reinsurer partners.
 - Because we are independent, we've partnered with Multiple Industry leaders in the Insurance Financial Services Sector, enabling us to objectively and impartially evaluate and select from a huge variety of financial solutions that would best suit the client's needs.
 - It is our intention that such solutions best serve the clients cost considerations, while establishing an optimal balance with their Employee Benefits and Investment Philosophy.
-



INDEPENDENCE

We are completely independent together with our associated providers.



EXPERIENCE

Our staff are experienced and have distinct set of skills and industry experience.



PLEDGE / COMMITMENT

We pledge our commitment to looking after the best interests of our clients and members.

OUR SERVICE MODEL IS BASED ON 3 PRINCIPLES



PROFESSIONALISM:

We offer our clients professional advice based on sound knowledge of the industry and through corporate awareness, as opposed to merely selling products.



ETHICAL PRACTICE:

In offering our clients the necessary advice and services we are mindful of the interests of all the role players, e.g., Employee, Employer, Scheme and Administrator, Investor, Retiree and Pensioner. By being transparent and always acting with integrity we attempt to balance the interests of all the role players.



DUE PROCESSES:

We believe that a professional and ethical approach directly implies that due process is always followed.

AFFILIATIONS

We take pride in being affiliated with amongst others the following organisations to work with and various industry leading insurer companies.



An Authorised Financial Services Provider: FSP 51670

KEY CLIENTS



Looking forward to being of service to you..



An Authorised Financial Services Provider: FSP 51670

THANK YOU!

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