

## Brenthurst Wealth Management

### Exceptional care for clients

The financial services industry in South Africa is one of the most efficient and admired sectors of the economy and as a result, one of the most competitive. Clients and consumers are bombarded with marketing messages about investment products, transactional accounts, savings options and tax issues, to name but a few.

In a complex investment and financial planning environment and given the level of messaging to clients and consumers, many find it difficult to choose an appropriate service or even company best suited to their needs.

This is one of the key drivers for the programmes of the Financial Planning Institute (FPI) to promote the highest level of standards through its CERTIFIED FINANCIAL PLANNER® certification for individuals and the FPI Approved Professional Practice™ brand for companies.

Brenthurst Wealth Management, which operates four offices in three South African cities, was one of the first private client wealth management companies in South Africa to receive the FPI Approved Professional Practice™ accreditation.

### Mentorship and certification

“The financial services industry and investment offerings to clients changed dramatically in the last ten years. Many of the changes have improved the service levels offered to clients, and we support the amendments made to promote ethical behaviour in the industry,” says Brian Butchart, CFP®, Managing Director of Brenthurst.

“We are proud of the fact that we surpass the minimum requirement to become an FPI Approved Professional Practice™. FPI stipulates that 50 percent of all financial planners in a company must have the CFP® designation. At Brenthurst, 71 percent of our financial planners have completed the course and practical work to obtain the qualification and the rest are currently in the process of completing the demanding schedule to achieve the CFP® credential.

We have a mentorship programme in place to guide and support the junior financial planners as this will further develop our company in years ahead. Furthermore, it is required that at least two key individuals must be CFP® professionals. Brenthurst’s two key individuals have the internationally recognised CFP® designation,” Butchart says.

### Professional financial planning

Serving their clients with the best possible advice and adhering to the highest standards of service are the cornerstones of Brenthurst’s approach. They are proud to have been one of the first companies to receive the FPI accreditation for what they consider as good business practice. It provides clients with a sense of security and sets high standards for their team. This also means that they adhere to the principles as set out by the Institute – putting clients first, acting with integrity, offering objective advice and delivering our service fairly and professionally.

Butchart added that financial planning is not a once-off event as clients’ circumstances change over time, which will impact their financial affairs. They manage relationships with clients on an ongoing basis to make sure that their investments and all their offerings to them remain relevant. “Having a full team of CERTIFIED FINANCIAL PLANNER® professionals is of great value for this, as it is a requirement that financial planners remain updated with any regulatory changes in the industry to maintain the status,” he said.

#### About Brenthurst Wealth Management

Brenthurst Wealth was established by Magnus Heystek in 2004 and currently manages about R3.5 billion on behalf of its clients. It operates offices in Johannesburg, Pretoria and two in Cape Town. The company offers a full range of solutions for clients which includes financial planning, investments, tax planning and fiduciary services.

Brenthurst is completely independent and can, therefore, offer clients access to a wide range of investment options and platforms, locally and internationally. The company makes use of associates for other services, for instance, short-term and long-term insurance, to assist clients with aspects of their financial affairs which cannot be managed by Brenthurst.

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

