consult.
by momentum

Consult Waterkloof Park

Wealth Management Financial Planning

Let's journey together

Meet Marnus Mostert

Marnus Mostert
Franchise Principal and Financial Adviser

With more than nine years of experience, Marnus has a wealth of in-depth knowledge in providing financial planning and advice solutions to clients. He is an expert in addressing clients' bespoke needs with unique solutions. His ability to listen, interpret and design client-centric solutions makes him a reliable partner to craft and implement financial solutions. Marnus has his NQF 5 financial planning certificate and is currently enrolled for his CFP at UFS.

Marnus is the Franchise Principal, and Financial Adviser of his franchise. His passion for clients and expertise has enabled him to establish a business anchored in trust honesty and integrity.

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What you can look forward to

Why Consult

Established in 2014, Consult has become clients' preferred partner in financial planning and advice solutions. Consult is proudly endorsed by the Momentum Metropolitan Group. As a client-inspired business, we provide unbiased comprehensive advice solutions through a team of specialist advisors that ensures we have the client's best interests at heart.

Growing and protecting your wealth through expert advice

At Consult Waterkloof Park we develop, strategise and implement holistic financial planning and advice solutions that grow and protect the wealth of both individual and business clients. We craft tailored solutions, applying the best advice principles while navigating the complexities to ensure clients reach their financial outcomes, making us your trusted advisory partner.

Our values

Vision: To be the preferred provider of financial planning and advice solutions to clients and their businesses.

Purpose: We partner with our clients on their financial journey, thereby giving them certainty and peace of mind to embrace the future with confidence.

We are advice-led
As a client-inspired business, we provide you with holistic financial planning and advice that assists you in achieving your unique financial needs and goals. Your success is our purpose.

We are professional
To consult is to seek advice from a professional. We provide you with specialist skills and knowledge to expertly guide you on your financial journey. Our professionalism is anchored in our ethics and competence.

We are trustworthy
We are the client's preferred advice partner. Our advice solutions are anchored in trusted financial planning principles that have your best interest at heart.

We are engaging
We believe in two-way communication and encourage clients to actively be part of their financial journey. We consult. You talk. We listen. We advise. We implement and monitor.

We are anchored in our Heritage
Our business is vested in a solid foundation. We are proudly endorsed by the Momentum Metropolitan Group as we carve our own space in the market.

Our philosophy

We provide professional and objective financial planning and wealth management advice with personalised client service.

We follow an **outcome-based investment strategy** that delivers on client's specific financial outcomes.
We apply a **robust investment process**, supported by a specialist research team and investment committee.

Our offering

Our practice offers best-of-breed product solutions from a carefully selected network of product providers, the latest technology and advice tools, and unbiased principled advice to fulfill clients' wealth creation, retention, and legacy needs. We deliver wealth management solutions through a combination of specialised investment assets and portfolios, including personal share portfolios, international investment solutions, bespoke investment solutions, alternative solutions, and venture capital. Fiduciary services are available to secure your legacy and address your intergenerational needs.

Our advisory services and solutions include:

- Financial planning for individuals and businesses
- Wealth management
- Investments
- Employee benefits
- Healthcare
- Car and home insurance
- Commercial short-term insurance
- Stockbroking
- Estate planning, wills and trusts*

What can you expect when engaging with us?

- We follow a value-based financial planning philosophy
- We will sign a confidentiality agreement in line with the professional code of conduct to protect your privacy in both personal and financial matters
- We will develop long-term financial strategies and partner with you throughout your financial journey
- We will provide you with a written service agreement to clarify client expectations
- We will conduct annual reviews to ensure tracking, implementation, and relevance to your specific financial outcomes
- We will provide access to specialists through our professional network

Our areas of expertise

We draw on a range of professional skills to deliver advice to clients

Due to the complexities and uncertainties of various client circumstances, these engagements include interaction with trusted professionals.

Our skills include:

- Establishing a network of specialist support partners that collectively provide insight as well as foresight
- Understanding and interpreting our clients' needs
- Designing client-centric solutions
- Exploring new ways of solving challenges
- Implementing financial plans to meet the clients' goals
- Supporting clients to reach their best possible outcomes
- Ensuring our clients receive the ultimate standard in personal client-centered service

Contact us

Consult Waterkloof Park

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