Consult Irene

Bespoke Financial Planning

Let's journey together

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 Irene 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.

The Consult way

To provide professional advice and product solutions to clients on their journey towards financial success, by ensuring they have a financial plan that is aligned with their financial goals.

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

Our behaviour is anchored in the core principle to establish and build equitable, value-driven, life-long partnerships with all our stakeholders.

Consult Values

What we believe
We're a business with heart, spirit, and an unshakable conscience. Our values make us who we are.

Accountability
We take accountability and responsibility by ensuring we honor our obligations to all stakeholders.

Diversity
We are truly proud of our diversity. We embrace inclusivity and celebrate the many perspectives and skills that people bring. It is our diversity that brings richness to our thinking and empathy to our actions, it is our irreplaceable human talent that makes us who we are.

Excellence
We strive for excellence, by delivering quality advice, solutions, and services to all stakeholders. We ensure that every interaction is memorable and meaningful.

Innovation
We are innovators. We constantly challenge ourselves to explore smarter solutions, simpler processes, and creative ideas. We explore new opportunities to always be future-ready. It is this inspired approach that keeps us growing – as individuals and as a team.

Integrity
We do the right thing. We keep to our promises, do what is right, act transparently, and always act in the best interests of our stakeholders.

Teamwork
We work as a team. We listen. We share. We collaborate. We support, encourage, respect, and inspire each other in our quest to achieve mutually beneficial outcomes.

Our culture
We have an inclusive value-based culture that comes alive through our behavior when we engage.

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, and 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 specialise in financial planning, personal and commercial asset protection, and wealth management solutions. We endeavour to save costs for our clients through expert advice.

Our advisory services and solutions include:

- Financial planning for individuals and businesses
- Wealth management
- Investments
- Employee benefits
- Estate planning, wills and trusts*

* Services not regulated by the Financial Sector Conduct Authority (FSCA)

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 and implementation, of 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

Meet Francois Pretorius

Francois Pretorius
Franchise Principal & Wealth Manager

Qualifications:

- National Certificate in Financial Planning (NQF6)

With 20 years experience in the financial services industry, Francois is a senior financial adviser, focusing on providing holistic, personalised advice and solutions to private individuals, professionals in private medical practice, business owners and SME's. He has a special interest in investments and business insurance.

Other services include, but are not limited to, advice on personal risk management, pre- and post-retirement planning and estate planning. In addition, he holds strong relationships with individuals such as chartered accountants and attorneys who can provide specific services to his clients in their own capacity.

Francois has been awarded several industry awards including two Sanlam Eagle awards, an SFA 100 award and multiple QA Ruby awards. These awards recognize excellent service, advice and the achievement of stringent production and retention requirements.

Francois holds distribution contracts with all the major product providers.

His ability to listen, interpret and design client-centric solutions makes him a reliable financial planning partner.

Contact us

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