consult. by momentum

Consult Kameeldoring

Bespoke Financial Planning

The Kameeldoring tree: the epitome of a lasting legacy, living for 200 to 300 years through extreme heat, cold and drought, while providing shelter and food for many. Let's plan your legacy.

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 Kameeldoring 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
- Stockbroking
- Estate planning, wills and trusts

Consult Kameeldoring specialises in providing business owners and high net-worth individuals with comprehensive business and personal legacy planning. Carl van Vuuren developed the 'legacy formula', an intricate, integrated, and ongoing process that is applied to guide business owners and high net-worth individuals to:

- Identify and define their legacy
- Grow their legacy
- Protect their legacy
- Plan the ultimate succession of their legacy in the most practical, cost-effective, and fair manner to all parties concerned
- Be the author of their legacy autobiography

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 Carl van Vuuren

Carl van Vuuren
Franchise Principal and Financial Planner

Qualifications:

- Advanced Post Graduate Diploma in Financial Planning (UFS)
- Certificate in Estate Administration (Unisa)
- Certificate in General Tax (Unisa)
- RE1 and RE5

With 32 years experience in the financial services industry, Carl entered the industry as a financial planner with AA Life in 1996. He started speciliasing as an Estate and Business Risk Analyst and has since played a key role in guiding his clients to grow protect and plan the succession of their legacies.

Carl works closely with an investment team at Old Mutual Wealth, Private Client Securities and other investment houses to guide high-net-worth individuals in achieving their investment goals, giving them peace of mind so that they can 'do life' without being concerned about their investments.

Carl provides his clients with holistic financial planning advice, focusing on wealth protection and creation. Wills and trusts form an integral part of Carl's advice process.

Carl also works with employers, assisting them through the process of selecting employee benefits most suitable for their needs.

Carl is the Franchise Principal and Financial Adviser for Consult Kameeldoring. His passion for clients and financial planning expertise has enabled him to grow a business anchored in trust, honesty and integrity.

Contact us

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What our clients think of us

"Carl offers next-level advice, that prior to meeting him, we had never experienced, although we had an adviser at the time. The processes Carl follows are complex and intricate but provide a plan that is easy to understand and specifically designed to address our legacy goals and dreams. Carl provides peace of mind."

Isabella & Tony April – Vision Décor & Events

"We met Carl in 2007 after he was referred to us by a professional Legal Adviser. Through Carl's on-going processes he has guided us through good and bad times of change, always ensuring that the LEGACY of our family business, will stand strong, now and for generations to come. We highly recommend Carl to all successful business owners."

Mark & Blandy Cloete – MB Fire Appliances, Atlantis

"For over more than 20 years, Carl has provided many of my business clients and myself, with a level of advice that I have yet to come across in over 35 years of business banking. His expertise, attention to detail, intricate processes and focus on structure, and the client's financial well-being, are reasons why he is regarded as one of the best."

Nico van der Westhuizen – Business Banker

Carl has been involved with the restructuring of both my personal and professional financial interests. The primary focus points were to ensure that my business and family was taken care of should I pass on. This included structure strengthening, pension availability in our primary operations organisation and general financial risk mitigation in the short, as well as long term.

Carl's approach was that of suggesting the best solutions for our various risks within budget. His skill and knowledge base are second to none and supported by an obvious understanding of the market. From my experience, his ability to understand the true need of the client and translate that into integrated solutions is his greatest asset.

Jaco Geyser – Geyser Enterprise Development Group

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