



rockfin
Beyond Wealth Management



HOW PROFESSIONAL FINANCIAL ADVICE CAN BENEFIT YOU AND YOUR BUSINESS

Whether you are in the capital accumulation phase, approaching retirement or enjoying the fruits of your labour, your financial well-being is our primary concern. As Financial Advisors, we get to know your individual needs, to ensure that we act as partners in providing advice that works for you, your family and your business.

We offer a full range of personalised financial services, providing you with an holistic financial solution. Empower yourself or your business and secure your future with Rockfin Financial Advisory and a tailor-made financial plan.

OUR OFFERING

Dynamic, Powerful and Intuitive Risk Management

Rockfin Financial Risk Management is intended to minimise financial hazards and other losses potentially associated with risks to your assets, business, or health. Your first line of defence is to identify your sources of risk and then to either avoid minimise or put contingencies in place for major exposures. Your last line of defence is insurance.

Comprehensive Estate Planning

Manage your assets and provide for your loved ones after your death. It is crucial that you plan in advance for the distribution of your assets upon your death. When you properly plan how your estate and assets will be distributed once you pass away, you are actively taking steps toward securing your family's financial future.

Confident Retirement Planning

Realising a comfortable retirement is an incredibly extensive process that takes sensible planning and years of persistence. Even once it is reached, managing your retirement is an ongoing responsibility that carries well into one's golden years. All it takes is a little homework, an attainable savings and investment plan, and a long-term commitment.

Secure, Hassle-free Investment Planning

Our investment experts help you understand the investment options available to you. Identify your investment goals, to explain the concepts and importance of asset allocation, diversification, compounding, and the risks and returns associated with various investment options, the impact of inflation, and an explanation of any associated fees and charges.

Smart, Simple Tax Planning

Rockfin Tax Planning Advisors help you take full advantage of tax exemptions available under the law. Ensuring you get the optimum use of tax exempt incomes and taking advantage of the permissible tax deductions and rebates. Whether you are looking for tax splitting, tax effective donations, retirement funding or capital gains exclusion solution, we've got you covered all whilst remaining tax compliant.

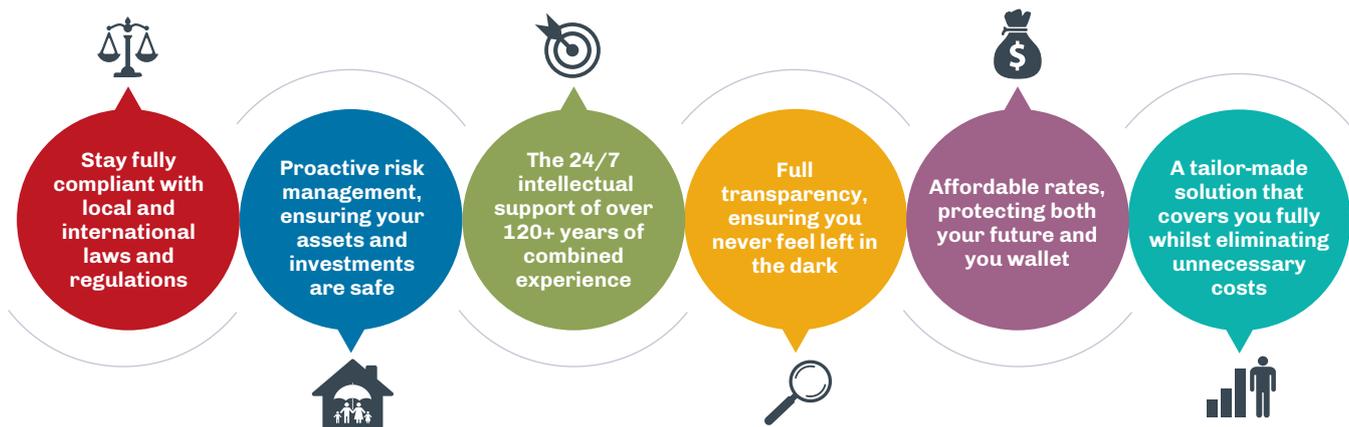
Offshore Structuring

When structuring or investing offshore in true foreign assets, a comprehensive offshore structure and professional advice is a crucial part for every personal, and or global company. We assist individuals, families and companies in adopting the best practices, and helping them to quickly adapt to the rapidly changing legal, regulatory and fiscal environment.





BENEFITS



CAPE TOWN

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GAUTENG

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Contact Rockfin accredited financial advisors to develop your tailor-made financial plan.



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