rockfin

Beyond Wealth Management

Are you an individual or company looking to expand your services and revenue streams?

Are you an attorney, accountant, tax practitioner, fiduciary service company, estate administrator, finance company, forex company or are in a related industry and truly understand the benefit of partnering?

Then partnering with Rockfin is for you.

WHO ARE WE?

Rockfin Wealth Management is a registered Financial Services Provider (FSP 13370) with the Financial Services Conduct Authority (FSCA), and a proud subsidiary of the Transformation Capital Group.

TCG has made several acquisitions over the past four years, including other FSP's and books of business, dating back to 1994 . The acquistions have been consolidted into a wealth management strategy (**Rockfin Wealth Management (Pty) Ltd.**), an own product strategy (**Myfin Financial Services - FSP 46640**) and our own group underwriting manager **Blue Anchor (Pty) Ltd - FSP 4620**).

Together with **TCG**, **Rockfin** focuses on building the wealth management strategy and brand for the group now, and into the future. The combining of personal planning disciplines, investment management, financial advisory, and fiduciary services, directly for the benefit of high net-worth clients, remains a key focus area for **Rockfin**. Our team of wealth advisors help clients construct an entire financial plan, and we advise clients on how to prepare for present and future financial needs. Our corporate strategy assists businesses with employee benefits and employer-based financial solutions for employees, company executives and shareholders of private business.

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.

Let's meet to discuss the prospects of a mutually beneficial partnership for both your business and ours. We take partner relationships seriously and apply a personalised and customized approach, ultimately leading to true colloaboration.

Talk to us:

CAPE TOWN

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

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