

Wealth

Your time
well spent



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insight · advice · impact

Your wealth isn't just about how you invest your money, but the time and effort you spend in making it and the care and precision you take to grow it.



What gives you fulfilment?



Quality time
with your loved ones?



Culinary adventures
in faraway places?



Exploring
the trails less travelled?

Time is an investment

You may make hundreds of decisions over your lifetime about your money and have limited time to manage your personal finances and wealth aspirations.

Alexforbes offers you specialised financial, fiduciary and estate planning by gaining a deeper understanding of your life goals, your financial objectives and your current needs.





Personalised insights

With a comprehensive view of your current employee benefits, retirement and wealth portfolio, we are well positioned to identify the gaps so that you can better manage and grow your wealth. Using planning tools which include cash flow modelling and forecasting we can give you clearer insights on the impact of today's decisions on your future wealth.



Investment advice

Core to each wealth management strategy, we measure and assess investment landscapes so that we're not only aware of but truly understand the trends and factors that we can leverage for your benefit. We are in partnership with Asset Risk Consultants to identify relevant investments for you and monitor those solutions to ensure consistent performance, good governance, fair costs and service excellence.



Global best practice for greater impact

In partnership with Mercer, a leading global employee benefit consultancy firm, our dedicated team of consultants will advise you on your corporate and individual needs, bringing to the table a wealth of global workplace and retirement trend insights.

We take time to understand your needs



Consider your time horizons, attitude and tolerance to risk to tailor a financial plan that suits you



Understand your individual priorities including: protection, retirement, savings and legacy planning



Use the investment and research expertise of our strategic investment partners to craft a strategy to meet your life goals



Keep you on track through continuous assessments and adjustments that help you reach your financial goals and objectives



Analyse risk to meet your short-term insurance and long-term protection needs





Receive a complimentary financial planning consultation

Let us look at how we can co-craft a financial plan with you to identify your family's overall financial goals.

We will use our insights, wealth management expertise and bespoke solutions to support you in achieving your personal desired outcomes.

We want to help ensure that the time you've invested, and the time you've spent with us, is time well spent. That it helps achieve a meaningful impact in your life and to those who matter most to you.

Connect with us.

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