

growing together



the **acsis** strategic partnership programme

acsis is an independent asset consulting and financial planning company. **acsis** advises financial planning firms, institutions, retirement funds and corporations on the development and implementation of financial plans and investment strategies.

acsis offers this comprehensive financial planning service to corporate and independent financial planners through a strategic partnership programme (SPP). This partnership allows both **acsis** and you, the financial planner, to concentrate on those areas that create the greatest value for clients. It offers you a growth partnership that generates better outcomes both for your clients and your business. In this partnership we pool resources, knowledge and development costs to stay ahead of the competition. There are two key focus areas of the SPP.

The first is **acsis**' 'best practice' approach to financial planning.

This approach, known as **acsis** lifestyle financial planning, is only available to clients through **acsis**' strategic partners (SPs).

acsis lifestyle financial planning starts and ends with the client and his or her desired lifestyle. It has a genuine focus on the client, rather than a focus on selling a financial product. It allows you to provide your clients with a holistic financial planning solution, and to implement every client's financial plan by way of an implementation strategy tailored to the client's specific individual lifestyle goals.

acsis lifestyle financial planning offers clients an improved way of determining an individualised, tailored financial plan helping them to achieve their long-term goals reliably. Every client receives a customised living financial plan incorporating his or her lifetime goals and current situation. This plan is reviewed on a regular basis.

The **acsis** lifestyle financial planning process benefits our SPs as much as it does the client. Applied properly, this process will result in, amongst other benefits, less client queries, less time spent on non-value-adding activities and will give you more time to see existing and potential clients. **acsis**' lifestyle financial planning approach helps you to standardise your financial planning service delivery to clients.

This standardisation and focus offers the following substantial benefits:

- ~ You gain greater control over each client's strategy – at any time, you know precisely what their strategy is and whether they are on track to achieve their goals.
- ~ You can measure each client's progress against their personal objectives – a powerful tool for keeping your clients committed to their long-term strategy.
- ~ It is easier for you to keep clients focused on their long-term goals (and resistant to short-term surprises) because their expectations are set upfront.
- ~ It is easier and less laborious for you to answer specific queries, because you know each client's needs and strategy.
- ~ You can efficiently communicate changes to the implementation of any strategy and explain how these changes are relevant within every client's financial plan.
- ~ You will have more time to concentrate on your clients and building sustainable value within your business.
- ~ This process will enable you to shift the focus from unreliable new business commissions, to charging a client care fee for your valued ongoing service.

The second is **acsis'** assistance in building, running and exiting your business.

At **acsis**, we strive to get a greater feel for our strategic partners businesses and the problems that they face. We understand that each practice is unique and that financial planners all have individual styles. Through our end-to-end business process, we help our SPs to run their business as efficiently and effectively as possible.

The SPP provides our SPs with more effective, profitable ways to service their clients and create real and sustainable value in their businesses. It offers them and their financial planning businesses a full range of support including practice development, practice management, compliance services, IT services, implementation services, efficient workflow, and administration services.

Our aim is to ensure that all our SPs continue to comply with international best practice and use the latest and most advanced financial planning techniques to the benefit of their clients, while building successful businesses.

The SPP benefits your business in four key areas:

1. differentiation

The SPP ensures that your clients recognise the value of your offering by:

- ~ providing them with a reliable solution
- ~ showing you how to focus on quality business from clients who value your service, rather than focusing on "volume at any cost"
- ~ focusing on generating maximum client value and charging a fair and reasonable fee for your services

2. sustainability

The SPP ensures that your business remains focused and adds value, beyond the results of your hard work and expertise, by:

- ~ focusing on effective communication and using proven systems to handle technicalities
- ~ ensuring that your business is structured for true business growth and is not "principal-dependent"
- ~ building a dedicated team that understands the power and true value of your offering
- ~ ensuring that your offering remains relevant

3. profitability

The SPP creates a sustainable business financial model by:

- ~ focusing on factors that produce long-term sustainable profits
- ~ eliminating all non-value-adding activities
- ~ understanding best practice, and continuously improving to achieve and maintain world-class standards.

4. partnership

Through the SPP, you will receive constant support from **acsis**. We will help your business grow by:

- ~ improving service delivery and allowing you to outsource fixed cost, low return activities
- ~ adopting new technologies that extend the resources available to you
- ~ staying ahead of the wave with the best client proposition, tools, education and strategies that help you to grow and maximise your equity return.

If you would like more information on SPP or about becoming a strategic partner, please contact us on info@acsis.co.za or phone us on (021) 670 7800 or (011) 8806107.

who is acsis?

acsis is an independent financial services group that guides clients along their journeys in achieving lasting financial well-being.

Our trusted advice empowers individuals and institutions to understand their financial options. This enables them to make the right choices on the development and implementation of their financial and investment strategies, based on their unique needs and goals.

Our financial planning and investment management philosophy, founded by ipac, is based on a sound, robust framework underpinned by ongoing research and international best practice. ipac is a global leader in the field of financial planning and investment advice.

We own the licence to ipac in South Africa exclusively. ipac is owned by AXA, one of the world's top three financial services companies. This strategic partnership provides us with a unique blend of local substance and strength with global resources.

At **acsis**, we employ forward-thinking people who are shareholders in the business. They all have a strong commitment and passion for financial planning and sound investment advice. With varied expertise and diverse tertiary backgrounds, they offer a quality of service unique in the financial services industry.

contact us

Cape Town

6th Floor, The Terraces
25 Protea Road, Claremont, 7708
t: +27 (21) 670 7800
f: +27 (21) 683 2831

Johannesburg

Cullinan Place, Block A, First Floor
Left Wing, 2 Cullinan Close, Morningside, 2196
t: +27 (11) 883 1303
f: +27 (11) 883 2666

info@acsis.co.za | www.acsis.co.za

acsis Limited is an authorised Financial Services Provider - Licence No. 26/10/588