

Named top advice broker again

Sasfin Wealth has retained the Top Advice Broker in South Africa for the second year in a row as well as being placed in the Top 5 in the People's Choice Award in the Intellidex Top Securities Brokers Awards.



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Helen Haworth was once again ranked in the Top 3 in the Individual Stockbroker Award.

Flynn Robson, Head of Portfolio Management & Stockbroking says that despite the distance created by the pandemic, they have retained their ability to connect, inform and educate clients.

“We have a simple philosophy - if we do well for our clients, then we as a business do well,” he says.

“We made our sole objective to protect clients, maintain service, connections and relationships as the markets fluctuated,” he adds.

A complex time

He says that the last 18 months has been significantly more complex with most South Africans applying a global lens when looking at their wealth requirements. “In terms of both discretionary and advice services, a borderless value proposition is now required.”

"This involves innovation, technology, multi-regional competencies, and a firm grasp of ever-evolving local and international regulations," he says.

However, he adds that perhaps most importantly, is their belief that the creation of wealth is about more than just growing financial net worth.

"True wealth incorporates both financial and non-financial aspects such as physical health, emotional well-being and achieving personal aspirations on a global scale."

Renamed, and now in its 12th year, Intellidex Top Securities Brokers comprises surveys that are completed by clients, delivering real feedback and ratings from investors. The survey was conducted between July and August 2021.

Last year Sasfin Wealth scored a perfect 5 out of 5 for its client support, including research and educational tools, as well as 4.67 for its offline support.

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