

momentum
investments

MFP
OUTCOME MATTERS

Anton Swanepoel

Closing and embracing better advice outcomes

23 November 2021

Common mistakes advisers make



- Over-selling
- Selling funds
- Market timing
- Selling investment returns
- Exaggerating professional abilities
- Underestimating the impact of various events on investment markets
- Underestimating client behaviour

Advice-led investment solutions

Circumstances,
needs and objectives

Risk profile
questionnaire

Suitability:
Ideal solution

Suitability:
Primary product

Specific fund
profiles

Agreement

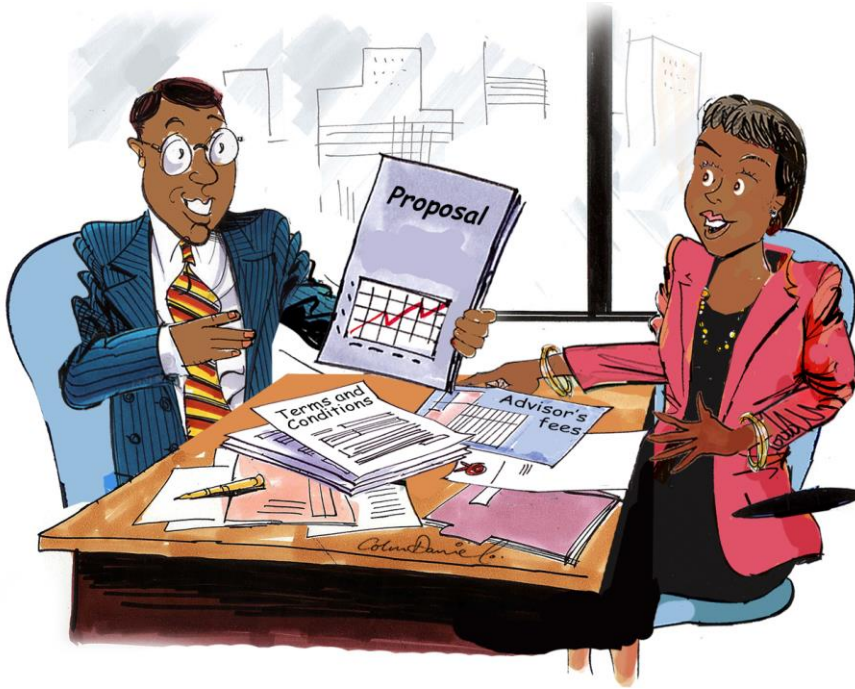
Client profile
Needs analysis
questionnaire

Risk tolerance
questionnaire

- Required return
- Required risk
- Risk tolerance
- Risk capacity



Advice-led investment solutions



Client

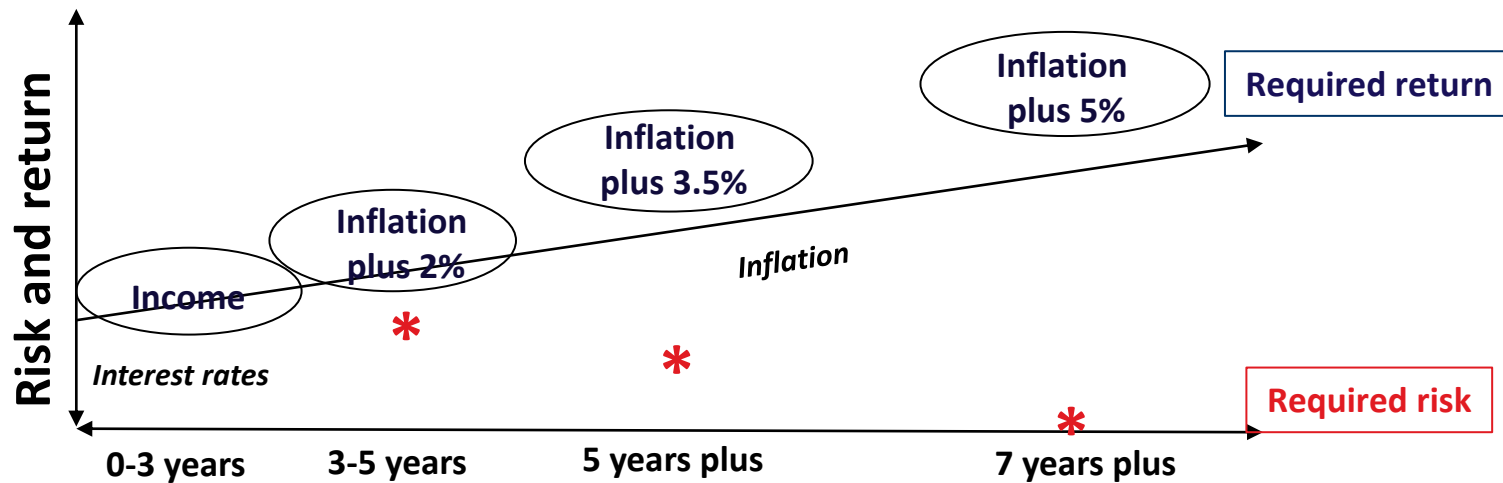


Adviser

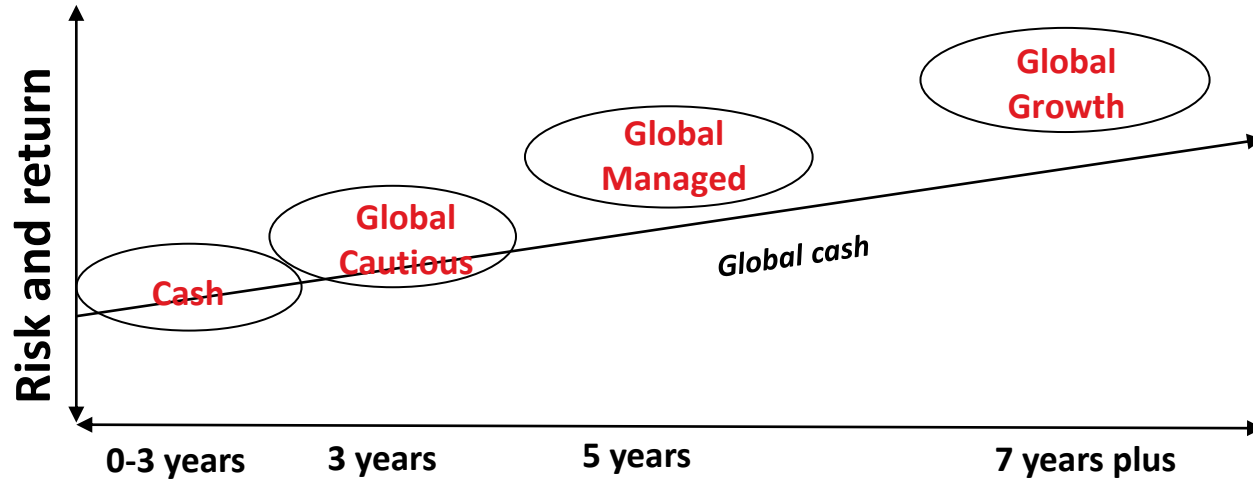


Investment
manager

Houseview investment solutions



Houseview investment solutions



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Thank you