

Best Adviser Firm in South Africa announced

The winners in the 2017 International Advisers Best Practise Awards for the South African region were announced on 05 October in Cape Town.

Launched in partnership with Old Mutual International, these awards recognise those wealth management companies within the industry that have made leading transitions towards best practice

Private Client Holdings was selected as the overall Best Adviser Firm in South Africa, and in total walked away with three awards including awards for Excellence in Professional Development and Excellence in Business Strategy and the best performing firm overall in South Africa.

Grant Alexander and Andrew Ratcliffe, the joint founders of Private Client Holdings explain that wealth managers have been witnessing unprecedented change in the industry – with customer expectations and demands, together with economic and regulatory reforms all throwing up new challenges, threats, and opportunities.

According to Ratcliffe, research shows that many wealth managers are taking the decision to develop more sustainable business models, with the aim being of giving their clients a more professional and consistent service experience.

"To be recognised as the company in South Africa that is leading the way in Best Practice in our sector is extremely exciting, and we are really pleased to have the hard work and dedication of our exceptional team and our company recognised."

The **International Adviser Best Practice Adviser Awards** were created to acknowledge global advisor excellence and are open to all authorized financial adviser / wealth management firms in various regions around the world. Private Client Holdings will automatically be entered into the Overall Best Adviser Firm up against companies in the United Kingdom, Europe, Hong Kong, Singapore and the Middle East.

Mark MacSymon CFP®, a Wealth Manager at Private Client Holdings, has also recently been chosen as a Financial Planner of the Year finalist in the 2017 FPI Financial Planner of the Year Awards. This is the second time that Mark has entered the FPI Awards – in 2015

he was one of only two runners up in what is considered the highest accolade a professional financial planner can obtain in South Africa.

MacSymon believes that being awarded the International Advisor Best Adviser Firm in South Africa and his selection as a finalist for the FPI Financial Planner of the Year Competition is testimony to the unique value proposition provided by Private Client Holdings and the professionalism of the team that supports its vision of “ Nurturing wealth”.

“The financial planning experience that our clients receive is without doubt a world class service, administered by a team of like minded professionals, whose mission to nurture the wealth of our private clients and their families, is at the core of everything we do at Private Client Holdings”.

“These recognitions by the *International Advisers Best Practice Awards* and the *Financial Planning Institute of South Africa* is further evidence of our commitment to the financial well-being of the clients whom we serve. It stress tests the quality and resilience of the financial plans prescribed by the wealth management team at Private Client Holdings and it affirms that the company's business strategy, marketing strategy, HR, practice and operations management and regulation compliance are all of the very highest standard.”

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