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Kanan Wealth's ongoing commitment to Financial Wellness

Phew, November already! As another frantic year draws to a close, we'd like to take a deep breath and share some of the things we've been doing at Kanan Wealth to provide our clients – both private and institutional – with the liberating benefit of Financial Wellness.

What is Financial Wellness?

If you're a private investor, Financial Wellness is a way of re-framing your wealth so that it adds meaning and joy to your life.

If you're an institutional investor, Financial Wellness is a gift you give your employees in return for the critical role they play in your business's ongoing growth and profitability. Financial Wellness is so much more than a salary which keeps up with inflation…It's a holistic package which looks after your employees and their families well beyond retirement.

Financial Wellness for our private clients

Because Kanan Wealth is a truly independent advisory business, we're able to give you totally unbiased financial advice which always puts your interests first. The word *independent* is not always fully understood and appreciated in financial services. It means we are not tied to any investment or insurance provider and there are no incentives to promote a solution that may be in our interest and not yours.

As a truly independent business, we face the challenge of continually having to evaluate the ever-increasing array of investment options available to investors. To assist us in finding the best solution for you, we work closely with Fundhouse, one of South Africa's leading investment research teams. Together we have created the Kanan Wealth Model Portfolios which are all underlined by groups of consistently performing unit trusts from trusted investment houses with investment strategies that are sound, achievable, tested and disclosed.

You can choose from eight Kanan Wealth Model Portfolios, including a very attractive property fund which offers exposure to the impressive returns the SA property market can offer. The Kanan Wealth Model Portfolios make choosing the most appropriate fund(s) easy. To achieve your investment goals, simply identify your time horizon (how long you want to invest for) and decide how much risk you are a) willing to take on, b) can afford to take on and c) need to take on.

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This investment process is married with the Kanan Wealth Financial Wellness Review process to ensure that your selected model is reevaluated and rebalanced at least annually. This keeps your underlying fund allocation (and its associated risks) in line with your original investment objectives.

Financial wellness for our institutional clients

Sometimes highly- qualified professionals like doctors, accountants, and lawyers, overlook their own Financial Wellness because they're so busy committing themselves to their clients' varying needs. In these kinds of businesses, employees' Financial Wellness is often the responsibility of a Human Resource Manager. Quite a burden for someone who lacks in-depth investment and risk management knowledge!

In these situations, Kanan Wealth provides the ideal solution: our Group Benefits Service which includes reduced fees, enhanced transparency and – ultimately – higher return on investment, thus ensuring Financial Wellness for your dedicated team of professionals. This service is provided in conjunction with our partners Allan Gray, Fundhouse and TSA.

Our growing team

We're privileged to have been joined by Jonathan Henning who brings exceptional intelligence, strategic thought and financial knowledge to the team. He has a B.Comm. from the University of Cape Town with majors in Financial Analysis and Portfolio Management and – to ensure we stay ahead of the pack – is currently completing his training as a Financial Planner.

In our quest to provide a truly comprehensive service, Jonathan has helped us to evaluate and select partners in other areas of financial planning, including fiduciary services (trusts, wills and estate planning), tax planning and business broking.

Our promise to you

Our dedicated team of investment experts will look after your money as if it were our own. We employ the best minds and tools in the business to make sure we get it right, time after time. We passionately believe that everyone in our community deserves the gift of Financial Wellness.