PLATINUM CONSULTING

An affiliate of LIBERTY

A big part of financial freedom is having your heart and mind free from worry about the what-ifs of life.

Platinum Consulting is an affiliate of the Liberty Group specialising in Taxation and Financial Advisory services with offices headquartered in Durban. The Liberty Group Ltd is an Authorised Financial Services Provider in terms of the FAIS Act (Licence No. 2409). The practice was established by six Associates on 1 May 2003. Our assets under management have grown to over R2 Billion. The success of our business is underpinned by our core values, principles and most importantly our commitment to our customers.

Our Business focuses on

- Wealth Management
- Tax Advice and Taxation
- Drafting of Wills
- Business and Family Trusts
- Estate Planning and Deceased Estates
- Life, Disability and Dread Disease Cover
- Medical Aid
- Education Planning
- Pension, Provident Funds and Retirement Planning
- Payroll Administration Services
- Accounting Services

Our Vision

Our vision at Platinum Consulting is to operate at the highest level of professionalism in the industry. This vision requires that all our advisors conduct themselves in a manner that is beyond reproach. It requires further that we treat this as our long-term professional careers. We have worked extremely hard to build the enviable reputation that we enjoy in the marketplace and amongst our valued customers. As such, we will guard this image with our lives and protect it at all costs.

Financial Planning

Wealth is not just about money. It is the activator to unlocking opportunities and is an integral part of building a solid foundation on which to achieve all your goals. We take a different approach to Private Wealth Management. W¬e start with a comprehensive Profile Analysis, as this allows us to design a portfolio to better assist you in managing your financial needs, ensuring that the offering can be tailored to match your growth and development milestones.

We embrace wealth in all its facets, and while it is not confined to financial planning, protecting, growing, and preserving your assets certainly is a core component. To assist you in achieving these goals, we provide professional advice and customised solutions through a range of products.

Financial Planning advice must always be part of a comprehensive, ongoing partnership between you and your Financial Advisor, allowing for the adaption of the ever-changing client requirements. The process we employ takes into consideration your income, expenses, investments and debt; your short-term and long- term goals including retirement; your taxes, financial risks, wealth protection, disability and death not forgetting the legacy you choose to leave behind. Together, we have the experience and skills to take control of your financial future and ensure that you own your life..

RETIREMENT PLANNING

In the simplest sense, retirement planning is the planning one does to be prepared for life after paid work ends, not just financially but in all aspects of life. The non-financial aspects include lifestyle choices such as how to spend time in retirement, where to live, when to completely quit working, etc. A holistic approach to retirement planning considers all these areas.

Estate Planning & Wills

Estate Planning is crucial if you are married, have been married, have children and/or support individuals financially. It allows for the protection of your loved ones from legal hassles and financial uncertainty after your death.

Planning your estate allows you to restructure your finances and assets in a way that ensures the relevant duties are minimised; that there is sufficient liquidity to meet your estate’s financial obligations upon death and ultimately, that any inheritances are sufficiently distributed or protected for your beneficiaries.

Trusts
Deceased Estates
Tax and Accounting

Trusts

Trusts remain an especially useful estate planning tool, if set up and managed properly. We assist you in the administration of trusts from structuring and formation to auditing and taxation of family and business trusts.

Deceased Estates

Dealing with the passing on of a loved one is never easy without having to worry about

- Financial Matters,
- Finalising the Estate
- Determining the value of Assets in the Estate
- Managing outstanding Debt.

The administration of deceased estates is generally the process of winding up the affairs of the deceased and ensuring that the terms of reference specified in the Will are carried out. Each person's assets, family and goals are different, and the administration of an estate can be extremely complicated. Our in-house Legal Advisor engages as the Executor for the deceased estate, taking care of all administrative requirements, managing this burden on behalf of the family.

Tax Consulting

Maintaining a sound tax compliant status is critical for both peace-of-mind as well as minimizing the risk of being outside of the law with Tax Authorities. We have extensive experience in assisting Clients with both their Personal and Business Tax affairs.

Taxes are a part of life and they do not have to be a burden. Our Advisors provide expert advice in helping you reduce your tax exposure allowing for maximum deductions and credits available to you.

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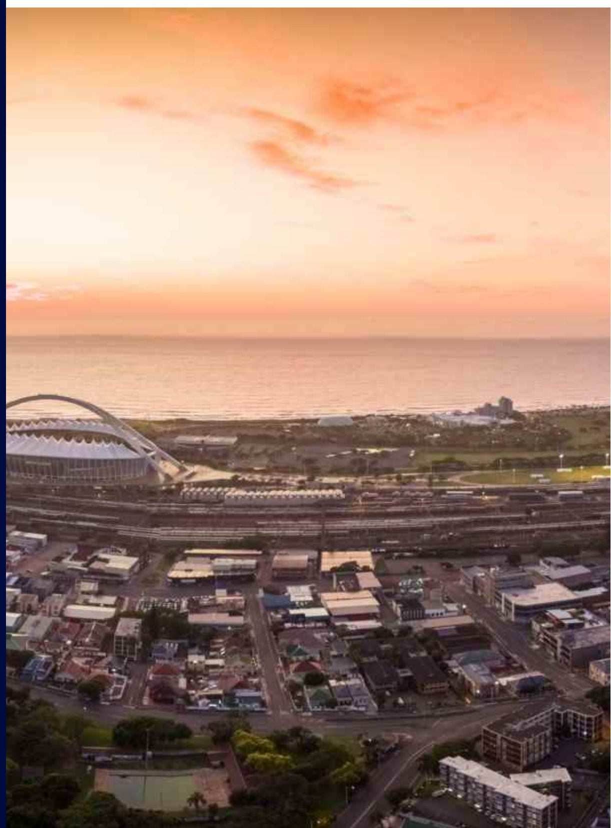

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