consult.
by momentum

Consult Linden

Composite Asset Protection

Let's journey together

Our story

In 2019, two ambitious young professionals, Vogan Von Staden and Calvin Leppan, had a vision to create a brokerage that would become the preferred advice and service provider for the leading engineering firms in South Africa. With a background in finance and a passion for engineering, mining and renewable energy, they began offering tailored financial solutions for this niche clientele. Having previously worked together at large financial institutions they combined their financial acumen with their knowledge of the industry, and today, the brokerage offers tailored financial advice and services specifically designed to meet the unique needs of this industry.

Meet Vogan von Staden

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Vogan is a highly accomplished professional with an educational background and extensive experience in the financial services sector. He obtained his BCom and PGD in financial planning, augmenting his expertise in the field. Additionally, Vogan holds multiple professional designations that further demonstrate his commitment to excellence. Since 2016, he has forged his career by working for distinguished companies within the financial services sector. His tenure with these organizations has equipped him with valuable insights and a refined skill set. Vogan's unwavering dedication to enhancing the financial portfolios of prominent corporations is driven by his passion. His ability to add value to large corporates' financial portfolios has consistently proven to be an asset, enabling businesses to achieve their financial goals more effectively.

Meet Calvin Leppan

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Calvin is a skilled risk management professional with a strong passion for risk and compliance. He is pursuing his FRM® designation and leverages data to manage risk successfully, creating visuals that are essential in his clients' risk reporting. He has gained a wealth of experience in structuring niche insurance strategies for commercial clients and has earned a reputation as a trusted advisor within the industry. Calvin sits on the Short-Term Insurance Committee of Consult, where he contributes his knowledge and expertise to help shape industry standards and best practices. He is committed to providing personalized and effective solutions that help his clients manage risk effectively and succeed in a complex business environment.

Our philosophy

We provide professional and objective financial planning, asset protection and wealth management advice with personalised client service. We follow an outcome-based investment strategy that delivers on client's specific financial outcomes, and apply a robust investment process, supported by a specialist research team and investment committee.

Our offering

Our practice and advice processes are characterized by a high level of expertise, personalized attention, and an unwavering commitment to finding the best possible solutions for our clients. We take an individualized approach to risk management, working closely with each client to understand their unique needs and requirements, creating customized solutions that address their specific risks and challenges. Our use of data analytics and visualization tools enables us to create effective risk reporting that provides our clients with valuable insights into their risk profiles and enables them to make informed decisions. We take pride in our ability to stay ahead of industry trends and leverage the latest tools and techniques to deliver the most innovative and effective risk management solutions available.

Our advisory services and solutions include:

Financial Planning

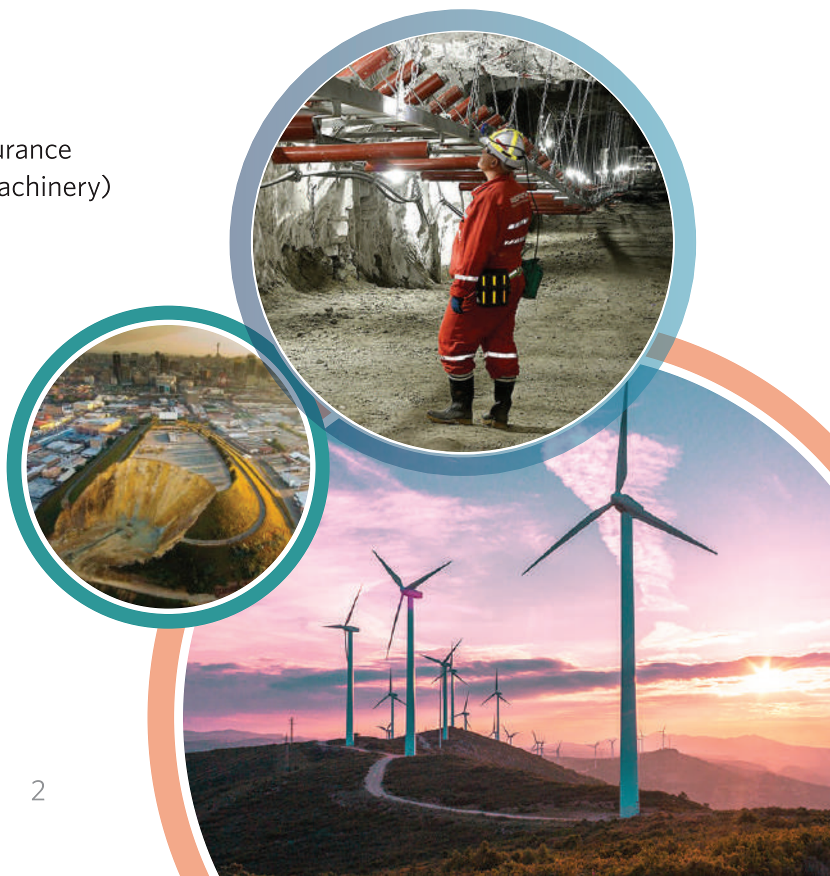
- Employee Benefit Schemes
- Pension/Provident Funds
- Buy and Sell Agreements
- Key Individual Policies
- Contingent Liability Cover
- Retirement Planning
- Investment Planning
- Wills and Estate Planning

Guarantees/Bonds

- Tender/Bid Bonds
- Performance Guarantees/Bonds
- Payment Guarantees/Bonds
- Credit Guarantees/Bonds
- Construction Guarantees
- Mining Guarantees
- Trade Guarantees
- Energy Guarantees
- Specialist Guarantees

Commercial Insurance

- Cell Captive Solutions
- Municipality Infrastructure Insurance
- Transporters (Heavy Commercial Vehicles) Insurance
- Asset Insurance (Buildings, Vehicles, Plant & Machinery)
- Contractors & Plant All Risk Insurance
- Professional Indemnity Insurance
- Liability Cover
- Agricultural Insurance
- Liability Insurance
- Professional Indemnity Insurance
- Agricultural Insurance



Why Consult

Established in 2014, Consult has become clients' preferred partner in financial planning and asset protection advice solutions. Consult is proudly endorsed by the Momentum Metropolitan Group. As a client-inspired business, we provide unbiased comprehensive advice solutions through a team of specialist advisors that ensures we have the client's best interests at heart.

The consult way

To provide professional advice and product solutions to clients on their journey towards financial success, by ensuring they have a financial plan that is aligned with their financial goals.

To be the preferred provider of comprehensive financial planning and advice solutions to clients and their businesses.

Our behaviour is anchored in the core principle to establish and build equitable, value-driven, life-long partnerships with all our stakeholders.

Consult values

- We're a business with heart, spirit, and an unshakable conscience, our values make us who we are.
- We take accountability and responsibility by ensuring we honor our obligations to all stakeholders.
- We are truly proud of our diversity. We embrace inclusivity and celebrate the many perspectives and skills that people bring. It is our diversity that brings richness to our thinking and empathy to our actions, it is our irreplaceable human talent that makes us who we are.
- We strive for excellence, by delivering quality advice, solutions, and services to all stakeholders. We ensure that every interaction is memorable and meaningful.
- We are innovators. We constantly challenge ourselves to explore smarter solutions, simpler processes, and creative ideas. We explore new opportunities to always be future-ready.
- We do the right thing. We keep to our promises, do what is right, act transparently, and always act in the best interests of our stakeholders.
- We work as a team. We listen. We share. We collaborate. We support, encourage, respect, and inspire each other in our quest to achieve mutually beneficial outcomes.
- We have an inclusive value-based culture that comes alive through our behavior when we engage.

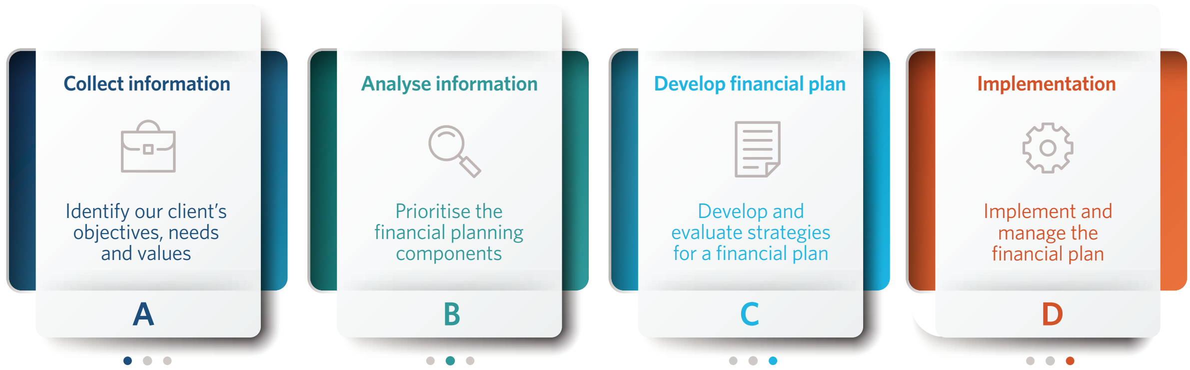
What can you expect when engaging with us?

- We follow a value-based financial planning philosophy
- We will sign a confidentiality agreement in line with the professional code of conduct to protect your privacy in both personal and financial matters
- We will develop long-term financial strategies and partner with you throughout your financial journey
- We will provide you with a written service agreement to clarify client expectations
- We will conduct annual reviews to ensure tracking and implementation, of your specific financial outcomes
- We will provide access to specialists through our professional network

We draw on a range of professional skills to deliver advice to clients

Due to the complexities and uncertainties of various client circumstances, these engagements include interaction with trusted professionals. Our skills include:

- Establishing a network of specialist support partners that collectively provide insight as well as foresight
- Understanding and interpreting our clients' needs
- Designing client-centric solutions
- Exploring new ways of solving challenges
- Implementing financial plans to meet the clients' goals
- Supporting clients to reach their best possible outcomes
- Ensuring our clients receive the ultimate standard in personal client-centered service



Our Product Providers

Consult has entered into intermediary agreements with many leading providers of products across a wide spectrum. These agreements are periodically reviewed to ensure that we offer a carefully selected range of the best products across different product lines. Each financial adviser has to register for a sub-code for those providers for which they can provide advice or intermediary services. Your adviser will inform you of the providers that they are personally authorised to deal with.

AC&E Engineering Underwriting Managers
AllanGray
Bidvest
BrightRock
CIA
cib
Consort Technical Underwriters
Firedart Engineering Underwriting Managers
Guardrisk Tailored Risk Solutions
Hollard.
iTOO
Leppard
Liberty
Lombard
momentum
Ninety One
OldMutual
ONE
pps
Sanlam
santam
SHA risk specialists
SYGNIA