ALLAN GRAY

APPROACH
YOUR DEPENDABLE PARTNER

APPROACH ADMINISTRATION PTY (LTD)

About us

Since 2007, Approach Administration has been empowering financial planners with back office support. Our experienced team and well-refined processes have enhanced many financial practices. We handle time-consuming tasks like onboarding, new business processing, and service changes, so you can focus on building strong client relationships and growing your practice. With our extensive network and our core values of integrity, efficiency and humour, we are your dependable partner.

Our value:

- **Streamlined administration:** Our experienced team and streamlined processes ensure tasks are completed accurately and promptly, maximizing your time and resources.
- **Improved scalability:** Our services offer a scalable and cost-effective way to manage your administrative needs.
- **Enhanced compliance:** Mitigate errors and ensure regulatory compliance with our robust processes and experienced team.
- **Dedicated support:** A dedicated team is always available to handle your administrative needs, freeing you to focus on client relationships and business development.

Your Benefits:

- **Cost-effective solution:** Access top-tier expertise and experience without the burden of additional staff costs.
- **Business growth:** Free up valuable time to build stronger client relationships, leading to increased revenue and satisfaction.
- **Reduced stress and improved well-being:** Gain peace of mind knowing your administrative tasks are handled by expert administrators.
- **Enhanced client experience:** Deliver seamless onboarding, service changes, and clear communication, fostering client satisfaction and loyalty.

Services offered

Running a financial practice can be tough. Between ever-changing regulations, new products, and client expectations, there just aren't enough hours in the day. Sadly, the primary task that drives income – financial planning - is often the first to be sacrificed when you're under pressure.

Every one of our services is designed and implemented to help you get in front of more clients. We know your situation is unique and your solution is just a conversation away.

My client admin:

We handle time-consuming tasks like onboarding clients, issuing of new business, amendments, and numerous other services. My Client Admin lifts the burden off of your pre-appointment and post-appointment administration. This frees you to build strong client relationships, deliver exceptional financial guidance, and ultimately, grow your practice.

My practice admin

Running a business amongst the landscape of FAIS, FIC, POPIA, CoFI etc. is difficult. Every practice has a long list of regulatory requirements. To work both on and in your practice at times just feel impossible. My Practice Admin is a service that maintains your records, applies for contracts, get your section 14 fee renewals signed, help prepare annual reviews and more.

My desk advisor

Do you want elevate your business and offer your clients a complete financial service? You can be their primary contact for every product they have. My Desk Advisor is a service that protects your business, secures your clients and generates more income for you. With this service you get a desk advisor to assist you with any products you do not wish to handle or are not licensed too.

Key individual

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Regions supported

The benefit of outsourcing is that even though we are based in Cape Town we have continued to grow and thrive nationally and internationally, servicing clients based in Johannesburg, Durban, Israel, UK and Mauritius.

Reference and pricing

We know that every advisor has unique needs and therefore we gear our proposals to specific requirements. Pricing is based on the assessment of your needs in terms of new business and servicing volumes, the scope of services required and additional needs you may have.

Please quote "AG Approach" when requesting a proposal to have a 10% discount included.