Elite Wealth

About us

Elite Wealth is a web-based wealth management and financial planning software solution, designed by a development team with more than 18 years experience in the industry. Our client base includes Sanlam Private Investments, Standard Bank Private Clients, NFB, Momentum Private Clients, First Global etc.

Value proposition

The Elite Wealth solution enables the financial adviser to consolidate product information from various providers onto one platform. The reporting tool also enables the financial adviser to report on an individual client, or prepare a consolidated report for a group of clients e.g. an individual client, spouse and a trust. An all-in one solution is provided including CRM, financial planning tools, workflow, document storage etc.

Services or products offered

Base package consists of the following modules:
- Client (CRM) module: The ability to link clients based on relationships e.g. individual, spouse, trusts etc.
- Portfolio module: The module is used to maintain information on products including risk products and investments. The aim is to provide a consolidated view of products invested in at different suppliers, to manage basic transactions and to automate reporting.
- Work portal module: To create and allocate tasks, customised workflows and actively manage your work queue. Also used for indexing and storing of client documentation in an online and secure environment, indexing and storing of internal templates and recording of client interactions.
- Asset and liability register module.

Financial planning package (can be taken in addition to the base package, but not as a standalone package):
- Financial planning module: This module was designed specifically for the management of an investment portfolio. A cash flow projection is used to do an affordability study for a client to determine if the client's income requirements can be met by his available capital. Funds are allocated to different categories based on your house-view setup. We cater for both asset and liability matching or allocating funds based on your risk profile for the client. Each category is represented by an asset class (or combination) and also by a house-view fund allocation.
- Risk return module: This module was designed to explain the concept of volatility to a client. The client's existing asset exposure is compared to a client's proposed asset exposure. Historical returns and volatility are calculated for the proposed and existing portfolios and compared with benchmarks.
- FNA: This module was designed from a life/risk point of view and analyses your position at death, disability and sickness. Calculations include all items required to provide sufficient capital to your dependants and to wind up your estate e.g. estate duty, executor's fees, accrual claim etc. It also includes a section for wealth creation, assisting you in determining what a client should save to retire based on their expected needs.

Key individuals

- Managing director: Rassie du Preez
- IT director: Kirill Peslyak
- Financial director: Janine du Preez

Contact person

Please send an email to support@elitewealth.biz and one of our representatives will call you back.

Contact details

Tel:	012 991 6790
Fax:	012 991 5054
Email:	support@elitewealth.biz
Website:	www.elitewealth.biz
Address:	Boardwalk Office Park, Block 7, Unit 7, Haymeadow Street, Faerie Glen, Pretoria

Regions supported

Quote reference and pricing

To qualify for the preferred rate or service enhancement, please quote the following reference.
Quote reference: Allan Gray Adviser Services
Pricing:
- Base Package (standard market fee): R650 per user per month.
- Financial Planning (standard market fee): R300 per user per month in addition to the base package cost.
- Minimum number of users: Five (5)
- Discount on above fees to Allan Gray Adviser Services:

Number of users	Discount
From 3 to 10 users	10%
Next 15 users	15%
Next 25 users	20%
Next 50 users	25%
Next 100 users	30%
More than 200 users	Negotiable