

WORK THAT MATTERS

About us

The Asset-Map Platform™ is used by thousands of financial professionals to better engage with their clients – centred around visually representing all their clients' household financials on one screen.

Value proposition

Over 1 million clients globally are using Asset-Map with their financial advisers to gain financial clarity. Asset-Map is one of the fastest-growing and highest advisor-rated financial planning tools in the US. It is used across North-America, the UK and, since 2019, in South Africa.

Services offered

Asset-Map is proudly supported by an experienced, full-time team of CFP® professionals based in Cape Town.

The platform has a unique combination of features including its Asset-Map Report™ household visualisation, the Discovery™ data collection tool, Signals™ proprietary algorithm feedback on financial event risks, Stencil™ peer overlays and Target-Map one-page goal planning.

Key individual

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Contact person

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Contact details

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Regions supported

All of South Africa

Reference and pricing

Individual subscriptions start at R1 850 (ex-VAT) per month for a Professional license, and pricing packages are available for larger practices.

Please contact us for a quote to meet your specific practice requirements.