

CRUX CONSULTING

About us

Crux Consulting is a Christian Company and is an independent compliance practice registered with the Financial Services Board since March 2005. It was started by Financial Planners for Financial Planners. Crux is a values based offering and seeks to partner with Financial Service Providers who share the same vision for the Financial Services Industry. We support both the letter and spirit of the law. It's all about substance over form. Our integrated business solutions are based on over 20 years experience in the Financial Services Industry combined with sound legal research and development.

Value proposition

- **We offer experience:** Crux Compliance has combined internal experience of over 20 years in the financial services industry.
- **We understand financial planners and their businesses.**
- **We offer expertise:** Qualified in financial planning, compliance and law.
- **We offer insight:** This comes from experience and working in the industry at grassroots level.
- **Peace of mind:** A sound and well researched compliance framework.
- **Confidentiality:** A business you can trust.
- **Reliability:** Crux Compliance stands by our business proposal, we deliver.
- **Results orientated:** Crux Compliance is committed to getting the job done.
- **Knowledge:** We continuously strive to upskill ourselves with regulatory matters.
- **News and updates:** An informative monthly newsletter which includes updates and version control templates.
- **Partnership:** We collaborate with other independent compliance officers, providing forum for seamless knowledge management.

Services offered

Compliance support

Crux Compliance is based on a family practice where we concentrate on a core group of clients who understand us, our value system and our model. Crux has developed a business solution which takes into account treating customers fairly principle, in that our services include a number of programmes that will assist financial advisers integrate their compliance obligations into their business process. The Crux team has 20 years collective financial planning, compliance and legal experience. They work strategically with like minded professionals where they leverage off a wider knowledge and experience base in practice management, financial planning and compliance. We are a young team of professionals that love and take pride in our work. We have great passion in what we aim to do and deliver. We aim to achieve this by transforming both people's lives and their business. We value our partnerships with our clients and look forward to building successful and sustainable business relationships.

Training

Compliance training is a key factor in achieving effective compliance with regulatory requirements. Our online training programme is an integral part of achieving a compliance culture within the business. The online training solution topics have been set out in such a way so the training objectives for each specific module is effective. Each module is a brief overview of the specific topic with an easy reference guide and a quick test to assist everyone in terms of their training obligations and record keeping requirements.

Key individual

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Regions supported

Johannesburg, Pretoria, Durban, Western Cape, Mpumalanga

Reference and pricing

Our fees are based on a flat rate per person per module. Group rates are negotiable depending on the query.