

WORK THAT MATTERS

About us

WORK.THAT.MATTERS. partners with Financial Planners to deliver excellent advice and awesome experiences to their clients. We do this using Asset-Map, a client engagement and financial planning solution which clients love.

Value proposition

We support Financial Planners to deliver great outcomes for clients through long-term, advice-led relationships. We do this by helping planners meet the needs of the client's Heart, Head and Hand (HHH) in their ongoing engagements. This forms the foundation for positive client outcomes, tangible value and enduring client relationships that result in successful, sustainable practices.

Services offered

WORK.THAT.MATTERS. gives hands on support, helping Financial Planners integrate Asset-Map and the HHH philosophy into their practices and their relationships with clients. We're only happy once HHH is a deeply embedded part of every interaction with every client.

The Asset-Map solution supports the HHH values by providing a full range of data collection, analysis and reporting tools to build a comprehensive financial plan and record of advice, bespoke to the planner or practice houseview. The output is presented in a client-friendly way showing their current and desired financial situations and the actions needed to take them from where they are to where they would like to be.

Key individual

Name: Gary Winslow

Contact person

Name: Gary Winslow

Contact details

Contact person: Gary Winslow
Tel (work): 083 444 3242
Tel (cell): 0834443242
Email: assetmap@workthatmatters.co.za
Website: www.workthatmatters.co.za
Address: Woodstock Exchange Woodstock

Regions supported

All of South Africa

Reference and pricing

Planner License: R1 850 (ex-VAT) per month
Support License: R950 (ex-VAT) per month

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