

## Moonstone

### About us

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Moonstone is a people's business operating in the financial services industry. We are independent and uncompromised, providing a comprehensive support network for financial advisers as shown below. Our well researched service provision is based on the current needs of the independent financial adviser and future industry demands.

### Value proposition

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Moonstone's independence allows it to offer a 'what-you-see-is-what-you-get' range of services. We add value by providing vital, practical support services to all levels of financial advisers and institutions, helping them manage FAIS and FICA compliance related risks to ultimately benefit all consumers of financial products.

### Services or products offered

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- Regulatory examinations: four permanent venues (Johannesburg, Pretoria, Cape Town and Durban plus over 70 other venues nationally)
- Information refining: investment indicators, Moonstone monitor, REview
- Licensing: FAIS, CISCAs and profile changes
- Risk management: FAIS and FICA compliance monitoring (comprehensive, support or ad hoc options)
- Financial empowerment of previously disadvantaged groups
- Training: Classroom and On-line

### Key individual

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Hjalmar Bekker

### Contact person

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Paul Kruger

### Contact details

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### Regions supported

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All of South Africa

### Quote reference and pricing

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To qualify for the preferred rate or service enhancement, please quote the following reference.

Quote reference: Allan Gray Adviser Services

Pricing: Discount of 2.5% (excluding regulatory examinations)