

## ALLEGIANCE CONSULTING

### About us

Allegiance Consulting is a company of legal & business analysts specialising in the field of financial planning that has been operating in the South African market since 1999. The focus of the company has been on the intellectual property. With experts in estate-, retirement-, and business planning, we service mainly the affluent and SME markets. We do this by supporting financial intermediaries that operate in the affluent and business markets.

### Value proposition

Our value offering is based on quality of content in the financial services industry. Allegiance's value proposition and focus is designed with the client in mind, and our services are focused to support the financial intermediary in the complex markets. We positioned ourselves in the markets to service affluent, SME and corporate markets. Our purpose is to increase our clients' value and reduce the advice risks in the target markets. We do this by offering a range of services and delivering via call center, para-planning and face to face consulting.

### Services offered

#### Avalon™

Avalon is a fourth generation financial planning toolset that empowers financial advisors to help their clients make better financial decisions. It is designed to facilitate meaningful discussions with clients and inspires co-creation of the client's financial plan.

#### Components of Avalon include:

- Wealth Planning
- Advanced Estate Plan
- Quick Financial Needs Analysis
- Saving for a Goal
- Investment Planning
- Retirement Planning
- Business Needs Analysis
- CRM

[www.avalon.co.za](http://www.avalon.co.za)

### Legal and technical centre support

Allegiance consulting offers assistance with regards to all queries about legal technical aspects in the financial services industry pertaining to life assurance and investments (local jurisdiction).

### Paraplanning

A paraplanner is someone who works beside a financial planner but also contributes skills beyond those of the financial adviser. These extra skills aid a financial adviser to achieve maximum efficiency and productivity in a financial planning practice. The adviser collects the information for the plan, and submits the information to the Allegiance Technical Centre. Allegiance para-planners then prepares a report on (1) estate plan, (2) investment plan, or (3) business assurance plan and submits it back to the financial intermediary. The intermediary saves time and can focus on client relationships.

### Trust and Fiduciary

Allegiance offers the drafting and set-up of inter vivos trust. We have a conservative approach to the use and application of trusts supported by some of the most experienced legal and financial experts on trusts. We also offer trustee training and have written a number of publications on trusts.

### Key individual

Kobus Barnard

### Contact details

[info@allegiance.co.za](mailto:info@allegiance.co.za)

0861 LEGAL1

012 360 0040

[www.allegiance.co.za](http://www.allegiance.co.za)

### Regions supported

- Call centre: National
- E-consulting: National
- Para-planning: National
- Trust & Fiduciary: National
- Face-to-face consulting: Gauteng, Bloemfontein, Eastern Cape and other areas on request

## Reference and pricing

To qualify for the preferred rate or services, please quote the following reference:

**Quote reference:** Allan Gray Adviser Services

## Pricing

- Subscription to Avalon is detailed below. Pricing excludes other services.
- Legal support and Para-planning is detailed below.
- Please contact us for more information on pricing for Trust and fiduciary matters

## Avalon subscription per month Amount (Ex VAT)

Per user and one assistant	R1 250
Additional assistant	R245
Where total users exceed 200, the offering will be at a discount of	R995 pm per user

Item	Amount (ex VAT)	Type
<b>Paraplanning services</b>		
Advanced financial needs analysis, business needs analysis	R5 000	Per event
Alteration of plan	R1 800	Per event
<b>Consulting services</b>		
Consultation	R1 500	Per hour
Travel expenses		Ad hoc
Legal opinion	R1 500	Per hour