APPROACH ADMINISTRATION PTY (LTD)

About us

Approach Administration has provided highly successful administration to financial advisers for over 15 years. We have been instrumental in many Financial Advisory Enterprises. We provide access to a team whose administration experience combined is over 50 years. With specialised department heads for each product namely; risk, investment, health and short-term.

With Michelle at the forefront leading, mentoring and motivating a team to get things done; Approach ensures peace of mind for advisers. We are well connected in the industry and our integrity, honesty and sense of humour is steering Approach Administration towards being the dependable partner an adviser needs.

Value proposition

At our core, we enjoy helping people and making a difference. As administrators, we are driven to be efficient and we want each of our financial advisers to run at their most optimal. We want to build loyal and professional relationships with adviser's clients and product providers. By doing this we strive to be a dependable partner for financial advisers.

We aim to enrich financial advisers and their businesses by providing a foundation that will improve productivity, save them time and give them back their mojo. We run on efficiency, care, trust, laughter and the ability to get the job done. Through an experienced, motivated and dedicated team we add value to their business and their clients.

Services offered

- Peace of mind – Although this is not a tangible service, we believe this is one of the key services we provide. Managing staff is not only time consuming but at times it is inconvenient. Imagine a world with no staff absenteeism, no maternity leave, no need to upskill or train, no pep talks or HR duties. Sounds like a dream right? This is what we offer!

- Administration:
  - New business processing and implementation – Checking applications, collating all relevant FICA and FAIS documentation and underwriting requirements. We manage all of this, all while keeping your client in the loop.
  - Servicing existing clients – From processing withdrawals and death claims, to change of debit orders and personal information. We handle all servicing.
  - Investment administration – Including but not limited to the completion of switches, section 14's and 37's. We oversee and run with the infamous section 14's leaving you with the work you enjoy; getting out to see and connect with clients.

Key individual

Michelle Taljaardt

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Regions supported

The benefit of outsourcing is that even though we are based in Cape Town we have continued to grow and thrive nationally and internationally, servicing clients based in Johannesburg, Port Elizabeth, Bloemfontein, Israel, Mauritius and New Zealand.

Reference and pricing

We know that every adviser has unique needs and therefore gear our proposals to specific requirements. Pricing is based on the assessment of your needs in terms of new business and servicing volumes, the scope of services required and additional needs you may have.

Please quote "AG Approach" when requesting a proposal to have a 10% discount included.