

MOONSTONE**About us**

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

Moonstone's independence allows it to offer a 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 offered

- FSCA regulatory examinations: four permanent venues (Johannesburg, Pretoria, Cape Town and Durban plus over 70 other venues nationally)
- Publications: Investment Indicators and the Moonstone Monitor
- Licensing: New licence applications (Cat I – IV) and licence amendments and profile changes
- Risk management and compliance: FAIS and FICA compliance monitoring (comprehensive, support or ad hoc options)
- Training and development: Classroom and on-line financial services qualifications and CPD
- CPD management: Fit and Proper Manager
- Online practice support: Policy Shepherd and Videosign

Key Individual

Hjalmar Bekker

Contact person

Neil Summers

Contact details

Contact number: 021 883 8000 / 072 908 8994

Email: nsummers@moonstoneinfo.com

Website: www.moonstoneinfo.com

Physical address: Valerida Centre, Piet Retief Street, Stellenbosch.

Postal address: PO Box 12662, Die Boord, Stellenbosch, 7613.

Regions supported

All of South Africa

Quote reference and pricing

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)