



JOSHUA SWANEPOEL Consultant

“Whether you think you can, or think you can’t - You’re right”

- Henry Ford

PROFESSIONAL ACHIEVEMENTS

- | Bachelor of Business Science Degree
- | Chartered Institute for Securities 8: Investment (Candidate) Level 3.
- | Member of AMA Africa Investment Committee
- | Promoted to Senior Business Development Consultant within 12 months of joining AMA Africa

PERSONAL ACHIEVEMENTS

- | MTB Cycle Challenge - In support of the Sabrina Love Foundation

Josh has always had a keen interest in finance and business. In 2017, he graduated with a Bachelor of Business Science Degree from Monash University. Following the completion of his studies, Joshua wanted to pursue a career in Financial Services, with a focus on Wealth Management. In January 2018, Josh joined the AMA Africa team, as a Business Development Consultant. He took on the role with great enthusiasm and was eager to learn and grow within the team. Josh is a self-starter; his drive and tenacity is palpable and was quickly noticed by management. Josh has successfully operated in Markets all over the world, establishing high-level relationships in the USA, China, Germany, Switzerland and throughout Africa.

In 2019, Josh was promoted to Senior Business Development Consultant, where he helped train and cultivate new recruits. In February 2019, he was given the opportunity to become a member of the AMA Africa Investment Committee, where he has played a vital role in facilitating new strategic partnerships and participated in the development of AMA Africa’s bespoke investment portfolio range: Citrine. Through hard work and dedication, Josh completed the AMA Consultant Training and Mentorship Program, a rigorous program overseen by Senior Founding Partner, Greg Morris, Partner and Africa Regional Manager, Ian Edwards. with special mentorship by Senior Consultant, Nick Pitro.

As a Consultant for Austen Morris Associates, Josh helps his clients to achieve their financial goals by carefully considering their specific situation, evaluating their current needs, as well as their long-term goals, providing each client with tailored holistic investment solutions to meet their individual needs. Josh prides himself on building long-term relationships with his clients, based on the core principles of trust, professionalism and transparency.

AREAS OF SPECIALIST FOCUS

- | Strong focus on Client Servicing
- | Global Portfolio Management
- | Retirement Planning
- | Education Savings
- | Portfolio Management Transfer
- | International Property Investing
- | Life Insurance

PRIVATE WEALTH MANAGEMENT

- | Retirement Modelling & Planning
- | Estate Planning & Fiduciary Review
- | Quantitative Portfolio & Fund Analytics
- | International Tertiary Education Planning
- | Direct International Property Investments
- | UK & US Pension Planning & Transfers
- | Portfolio Gearing & Sophisticated Investments
- | Mutual Funds & Exchange Traded Funds
- | Direct Share Investments
- | Investment Bank Products
- | Employee Benefit Schemes
- | Business Assurance
- | Health Care