



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

Joshua Swanepoel is a Consultant at Austen Morris Associates, bringing a disciplined, relationship-driven approach to international wealth management. With a strong foundation in finance and business, Joshua graduated in 2017 with a Bachelor of Business Science degree from Monash University, after which he set his sights on building a long-term career in financial services with a focus on holistic wealth planning.

Joshua joined the AMA Africa team in January 2018 as a Business Development Consultant, where his energy, work ethic, and natural curiosity quickly set him apart. A self-starter by nature, his drive and tenacity were recognised early on, leading to rapid progression within the group. Over the course of his career, Joshua has successfully operated across multiple global markets, establishing high-level professional relationships in the United States, China, Germany, Switzerland, and throughout Africa.

In 2019, Joshua was promoted to Senior Business Development Consultant, taking on additional responsibility in training and mentoring new recruits. That same year, he was selected to join the AMA Africa Investment Committee, where he has played an active role in developing strategic partnerships and contributing to the creation of AMA Africa's bespoke investment portfolio range, Citrine. He also completed the AMA Consultant Training and Mentorship Programme — a rigorous development pathway overseen by senior leadership — further strengthening his technical expertise and advisory capability.

As a Consultant, Joshua works closely with his clients to understand their unique circumstances, short-term priorities, and long-term objectives. He is known for delivering tailored, transparent, and practical financial solutions designed to support sustainable wealth creation. Above all, Joshua prides himself on building long-term client relationships founded on trust, professionalism, and clear communication — values that continue to define his approach and success within the Austen Morris Associates group.

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