



**KIRK McARDLE**  
Associate Partner &  
Regional Manager: Africa

“Do something today that your future self will thank you for.”

- Sean Patrick Flanery

**PROFESSIONAL ACHIEVEMENTS**

- | Managed 180 staff members
- | Regulatory accreditation – Representatives RE5
- | Higher Certificate in Wealth Management

Seeking a new challenge, Kirk relocated to China in 2009 to take up the role of Financial Consultant. Having spent 17 years in the client services industry in the UK, managing over 180 staff in a 24-hour, client-driven environment, Austen Morris Associates seemed like the perfect match.

Working with individuals and their families to help them reach their long-term financial goals is a passion. Kirk assists potential clients by tailoring bespoke solutions for areas such as retirement planning, education planning, wealth management, and pension transfers. Kirks’ areas of expertise include client servicing, technical knowledge, wealth management, portfolio management, as well as keeping up to date on global market trends.

Based in AMA Africa Head Office in Johannesburg since 2013, he has been assisting ultra-high net worth international investors with bespoke financial solutions, including the creation and structuring of offshore corporate entities, to maximize tax jurisdiction efficiency.

**AREAS OF SPECIALIST FOCUS**

- | Sophisticated solutions for professional investors.
- | Retirement & Estate Planning
- | Executive and Board level investment structuring.
- | Global Portfolio Structuring and Management
- | Discretionary Trust Setup and Management
- | Tax Efficient International Corporate Structuring Set-Up

**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