



CHAD GODDARD

Senior Consultant

“Energy and persistence conquer all things”

- Benjamin Franklin

PROFESSIONAL ACHIEVEMENTS

- | Currently studying through The Chartered Institute for Securities & Investment (CISI)
- | Worked abroad and gained international experience in the financial advisory industry
- | Recruited Senior Executives in the banking and legal industry
- | Managed and developed a team of graduates in an International Financial Advisory firm

Chad Goddard is a Senior Consultant at Austen Morris Associates with over a decade of experience advising clients on sophisticated local and offshore investment structures. He specialises in the design and implementation of tailored financial solutions, combining deep technical knowledge with a highly client-centric approach. Chad maintains extensive expertise across retirement planning strategies, including cost efficiency, investment constraints, cross-border tax considerations, and sustainable drawdown solutions. His ability to navigate both domestic and international regulatory environments enables him to deliver clear, informed guidance to clients with complex global financial needs.

Having worked extensively with clients across multiple jurisdictions, Chad has successfully built and maintained long-term advisory relationships entirely remotely an uncommon achievement within the financial services industry. By leveraging advanced digital tools and video-conferencing technology, he provides a seamless, high-touch advisory experience regardless of geography. Known for his meticulous attention to detail, responsiveness, and professionalism, Chad places strong emphasis on communication, transparency, and ongoing engagement. Clients value his ability to translate complex financial concepts into practical, actionable strategies while maintaining a holistic focus on their long-term objectives.

Chad plays a key role in driving Austen Morris Associates' global reach by embracing innovation and helping shape a modern, digitally enabled client experience—ensuring that each client relationship is built on trust, clarity, and long-term value.

AREAS OF SPECIALIST FOCUS

- | Sophisticated solutions for professional investors
- | Executive and Board level investment structuring
- | Global Portfolio Structuring and Management
- | Discretionary Trust Setup and Management
- | Offshore company structuring - GIB | MAU | Malta | Other

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

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REFERENCES AND TESTIMONIALS

Austen Morris Associates - Communication and working timelines are met to the highest standard “Chad is a pleasure work with, throughout my dealings with him he has always maintained care for our relationship over and above my portfolio. He has ensured our communication and working timelines are met to the highest standard. I’ve found Chad to be very thorough and more than happy to take the time always to keep me updated and continue to answer all questions in a timely and professional manner. He is also very personable and courteous, with a keen attitude to deliver the best service. Chad keeps updated on current market developments and regulations, and his attention to detail and analysis of my portfolio has been most informative and insightful. In my opinion, Chad is a knowledgeable and professional advisor, and I feel comfortable entrusting my international arrangements and overall portfolio management to him. I would happily recommend Chad to others who require assistance regarding their financial planning.”

Warren Drue - Partner - WEBBER WENTZEL

Austen Morris Associates - Stability and professionalism “In our new business process, we are rigorous in terms of the advisory organisations that we wish to undertake business with. We consider AMA to be the leading advisory group in South Africa and China, driven by individuals, who have an outstanding attention to detail and a real passion for delivering positive client outcomes. In an industry, which has become increasingly fragmented, the level of stability and professionalism within their senior team makes it easy for us to deal with, in an ever-changing international pensions landscape. We have always found AMA’s team to be at the forefront of adapting to these changes.”

Stewart Davies - CEO at Momentum Pensions

Austen Morris Associates - Informative and insightful “Chad keeps himself current with market developments and regulations, and his attention to detail and analysis of my portfolio has been most informative and insightful. In my opinion, Chad is a knowledgeable and professional advisor, and I feel comfortable

entrusting my international arrangements and overall portfolio management to him. I have known Chad since spring 2017, and he has been a pleasure to work with and throughout our dealings has always maintained care for our relationship over and above my portfolio. Ensured our communication and timelines are kept to the highest standard. I’ve found Chad to be very thorough and more than happy to take the time always to keep me updated and continue to answer all questions in a timely and professional manner. He is also very personable and courteous, with a keen attitude to deliver the best service. I would happily recommend Chad to others who require assistance regarding their financial planning.”

Andreas Koutsoukos - Executive Director

“I am delighted to write this brief letter confirming that Chad has managed my pension investments exceptionally well for the last couple of years since your firm took over my portfolio in difficult circumstances. Following regular feedback and quarterly reviews, you have given me sound investment advice which, despite these unpredictable times, has resulted in net financial gains. I am happy to recommend your services to others”.

Stephen P Bunker - Merlin Consulting SA

I have been working with Chad for more than two years and he is managing both International and local pension funds for me. It is a pleasure to work with Chad and throughout our dealings he has cared for our holistic relationship. Chad ensures that communication and timelines are kept to the high standards. Chad’s client focus resulted in him being prepared to schedule face to face meetings at 06h30 in the morning to suit my availability. I have found Chad to be very thorough and more than happy to take the time to always keep me updated and answer questions in a timely and professional manner. He is very personable and courteous, with a keen attitude to deliver the best service. Chad’s attention to detail and analysis of my portfolio has been informative and insightful. In my opinion, Chad is a knowledgeable and professional advisor and I recommend Chad to others who require assistance regarding their International and Local financial planning requirements.

Andre van Tonder