

Free yourself to make your greatest impact



Investment Solutions by Alexforbes

The investment landscape is shifting at an unprecedented rate, driven by regulatory reforms, the emergence of new and innovative strategies and heightened client expectations.

For IFA practices, there are a range of additional challenges that limit your time to providing exceptional service and outcomes to clients. These include sourcing and selecting traditional and private market (and other alternative) opportunities from a global universe, managing operational demands and costs, competitor differentiation and navigating complex regulatory environments.

To stay ahead of the curve and position your practice for long-term success takes time, precision and focus.

Forward-thinking independent financial advisory (IFA) practices are actively seeking partnerships with specialist expertise to enrich their value proposition and attract a broader client base.

A Discretionary Fund Manager (DFM)

A Discretionary Fund Manager (DFM) partners with financial intermediaries, such as independent financial advisory (IFA) practices, to offer centralized investment services. DFMs handle investment research, analysis, reporting, compliance, and portfolio management. This partnership benefits IFAs by freeing up their time to focus on advising clients and growing their business. By outsourcing these tasks to a DFM, IFAs can provide high-quality advice, guide clients on financial behaviour, and enhance their value and competitiveness in the market. Ultimately, this empowers IFAs to concentrate on client guidance and business development, strengthening their role as trusted advisers.

Introducing Investment Solutions by Alexforbes

A sustainable and profitable financial practice is all about taking care of your clients' goals and making the most of your time and your schedule.

With Investment Solutions by Alexforbes as your DFM partner, you not only have a powerful investment proposition for your clients, but we'll also take care of research, analysis, reporting, and compliance, giving you more time to guide them, coach them on good financial behaviour, and source new business.

All that and unparalleled access to a wide range of local and global investment opportunities, competitive pricing and tailored solutions will help you make your greatest impact through your advice, in the sustainability of your practice, and in every aspect of your clients' financial lives.

If freeing yourself to make your greatest impact is your destination, you're in the right place, with Investment Solutions by Alexforbes.

All you expect from a DFM and more



Track record

Benefit from a 28-year track record that has been tested across various market cycles and consistently outperformed benchmarks. Gain confidence in delivering superior outcomes for your clients as we leverage our proven expertise to identify and blend high-quality asset managers and strategies into well-diversified portfolios.



Independence

Experience true independence in investment selections, free from ties or conflicts of interest. Keep a firm grip on the integrity of your advice with a transparent and accountable investment process that aligns perfectly with your proposition and ensures your clients' best interest always come first.



Buying power

Leverage the size and position of South Africa's largest multi-manager (R599 billion combined AuA and AuM as at March 2025) to access preferential fees and advantageous fee structures. Tangible cost savings in overall investment management and other variable costs means more returns for your clients and greater commercial growth and competitiveness for your practice.



Niche opportunity sets

Unlock exclusive investment opportunities in hedge funds, private markets, and other niche strategies that may otherwise be inaccessible, too expensive, or too complex for you to access independently. Lean on the right resources and expertise to set yourself apart and enhance your practice's appeal among discerning clients seeking specialised investment strategies.



Global advantage

Experience the advantage of our strategic global partnership with Mercer Investments (\$17.7 trillion AuA as at December 2024 and \$669.9 billion AuM as at June 2025). This powerful relationship merges two formidable investment teams, combining unparalleled global scale and capabilities with local expertise, to deliver compelling global propositions suited for your clients unique local (or offshore) needs, and preferences.



Practice support

Explore, engage and leverage a wealth of insight and data to your practice's advantage. Utilise market leading resources from across retirement, administration, healthcare and investments to help frame issues clearly, and feel in control, confident and secure in the credibility of your guidance and recommendations to clients.



Succession planning

Ensure continuity and stability in your practice with assistance in structuring and executing seamless succession strategies. Whether it's preparing for retirement or being faced with unexpected events, such as illness or incapacity, you can rely on the financial strength of a well-capitalised balance sheet to provide you and your clients with peace of mind, confidence, and security throughout the process.



Safety of assets

Enjoy peace of mind knowing that your advised assets are in safe hands. Thorough operational due diligences and annual monitoring of asset managers, you and your clients are reassured that every precautionary measure possible is taken, to protect and account for every rand of theirs invested.

Let's partner for impact.

Disclaimer:

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