



OAKFIELD

WEALTH MANAGEMENT

Time. Wisdom. Wealth.

COMPANY PROFILE

OAKFIELD WEALTH MANAGEMENT (PTY) LTD
REGISTRATION NO: 2017/256765/07/
UNIT 16, WELLINGTON PARK, DURBANVILLE, WESTERN CAPE, 7550
DIRECTOR: GERALD JOHN THOMPSON CFP®
FSP NO: 50597

COMPANY PROFILE

ABOUT US

Oakfield Wealth Management is an independent financial advisory business and a continuation of Thompson Financial Solutions which was established in 2005.

With an active and growing client base in the Western Cape, the company is expanding its operations and continuing to explore new and creative ways to serve its diverse range of clients.

We have more than 20 years of experience in the following areas:

- Independent Financial Advisory Services.
- General Insurance Industry Services and Products.
- Administration of Pension and Retirement Funds.
- Financial Consulting.
- Investment Management and Corporate Insurance Products
- General Financial Expertise and Investment Skills.

We view ourselves as holistic financial planners and would like, where possible, to assist families and individual assist clients with all their investment and life insurance needs.

ABOUT THE FOUNDER

Gerald Thompson was born on 30 January 1974 and grew up in the Northern Suburbs of Cape Town and completed his BCom at the University of Stellenbosch.

Gerald spent 2 years working for Old Mutual in South Africa, and then went abroad and worked in the UK for a further 2 years. He returned to South Africa and then joined Liberty Life in 2002 as a financial consultant.

Gerald became an independent financial advisor in 2005 and started his own business, Thompson Financial Services. In 2009 Gerald qualified as a Certified Financial Planning Professional (CFP) through the University of the Free State. In 2019 Gerald started Oakfield Wealth Management as a continuation of his existing business.

Gerald has been married to his wife Vivian and they have two sons. He enjoys the outdoors, especially when it entails endurance exercises or adventure. He maintains a lifestyle of learning and enjoys acquiring interesting and new skills to give texture and depth to his life.

Gerald's favourite quote which he also aspires to is *"The price of discipline is always less than the pain of regret"* by Nido R Qubein.

COMPANY PROFILE

OUR SERVICES

We understand that clients have very specific needs, ranging from simple to complex investment and inheritance scenarios . In response we offer a range of personal services to our clients to ensure that we address those needs in the most effective way.

Our services include:

- Personal Financial Analysis
- Financial Planning and Rollout
- Brokerage Services and Advice
- Fiduciary Support Services

PERSONAL FINANCIAL ANALYSIS

Our services include:

- Cost and Revenue Analysis.
- Financial Needs Assessment.
- Socio, Economic and Familial Needs Assessment.
- Risk Profiling and Analysis.

FINANCIAL PLANNING AND ROLLOUT

Our services include:

- Creating a Legacy Plan.
- Creating a Wealth Plan.
- Product Specification and Market Comparisons.
- Rollout and Execution.
- Annual Reporting and Contact Sessions.
- Portfolio Reviews and Valuations.

BROKERAGE SERVICES AND ADVICE

Our services include:

- Life Insurance Products.
- Medical Aid Schemes.
- Endowment Planning.
- Disabilities and Dreaded Disease Cover.
- Income Protection Products.
- Retirement Planning.

FIDUCIARY SUPPORT SERVICES

Our services include:

- Drafting of Last Will and Testament.
- Creating Living Wills.
- Estate Planning and Taxation.
- Exercising Power of Attorney and Curatorship.
- Asset Management.
- Trust Administration and Finance.

COMPANY PROFILE

OUR CLIENT FOCUSED PLANNING PROCESS

Creating dynamic and bespoke financial solutions goes hand in hand with following a unique planning process. At Oakfield Wealth Management we follow 6 important steps:

- Step 1 – Establish A Professional Relationship.
- Step 2 – Create A Collective Understanding of Goals.
- Step 3 – Obtain and Analyse Financial Status.
- Step 4 – Develop and Approve a Legacy and Wealth Plan.
- Step 5 – Activation and Rollout.
- Step 6 – Update, Check-in and Re-evaluation.

OUR PARTNERS

FUNDHOUSE
investment clarity

G.M.
ATTORNEYS

FinLego
Specialist Legal Services

FinaMetrica

CONTACT US



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