



NOVEMBER 2009

FINANSIËLE- EN ADVISEURSNUUS

nuus

IN HIERDIE UITGAWE

Wie kolf in jou span?

Taxi-tammeletjies

Wat is SCIDEP – en wat is dit nie?

Hou-vir-hou ooreenkoms bloedneus geslaan

According to the website www.sa-venues.com, Bethal derives its name from parts of the names of sisters Elizabeth du Plooy and Alida Naude. It is appropriate, therefore, that the SA Best Practice finalists from this town in Mpumalanga are the only “all-girl” team in the group.

With 12 years of experience behind her, principal Miempie Langdon is well entrenched in the business and opened the La’Machri doors two years ago. Their focus is on estate planning and administration, and with specialised software installed recently, La’Machri is already in the process of developing an excellent reputation and competitive advantage in the field.

On the subject of software, this practice was again able to surprise with its outstanding application of @Work – being the only practice amongst the finalists who make use of this CRM and FNA system. The detail and practicality of the procedure manuals that have been captured in the @Work system are particularly impressive.

In terms of future challenges, Langdon is also convinced that sustainable profitability is an issue that will tax the minds of the serious financial advisor. “It’s not just a matter of doing the right things,” she says, “but you need to offer value that is relative to the return you receive as a practice. In the past the solution may have been to sell more products. Today, running an efficient business has become a priority if you want to be around tomorrow, delivering services to your clients.”

Another challenge, according to Langdon, is being able to adapt and strategically realign one’s business. “While there is ample place in the market for the general financial planner, many practices are specialising in preferred fields or taking advantage of competitive opportunities. In such instances, being able to outsource aspects of the business to reliable alternative service providers is a critical function.”

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