



# FINFLASH

## **FINFOCUS SHARES GOOD NEWS IN UNCERTAIN TIMES AND SAY THANKS**

Since the beginning of the Covid pandemic in March 2020 the Finfoocus advisors and support staff have worked non-stop to service and advise clients on their investments, insurance and financial planning. In many cases restructuring of investments and insurance portfolios was required due to the negative effects of the pandemic. The pandemic affected all of us. Some of our clients lost their jobs, others had to liquidate their businesses and quite a number had to rely on their investments and savings to support themselves or family members who were in financial distress. Some of our clients died of Covid. Insurance and death claims had to be dealt with as well.

Our Finfoocus team was able to continue with client service and the rendering of advice, even during the hard lockdown of level 5. It was possible because Finfoocus already had a well-functioning cloud- based computer system in place. Over the past 18 years we also established good and reliable systems and processes with regard to recordkeeping, compliance to legislation, the advice process, managing of investments, as well as client service. These systems and processes make it possible for our advisors and support staff not only to work effectively from home, when needed, but also to ensure continuous service to our clients when advisers retire, leave the company or even die.

Some staff changes are carefully planned and others unexpected. Amy van Niekerk decided a few years ago that she wanted to retire gradually and started the process of handing over her clients to her colleagues – many of them to Hannes Schoeman. She wanted to finally retire at the end of March 2020. Hannes Schoeman's very unexpected and untimely death at age 33 in February 2019 was an enormous shock to all of us. His clients had to be transferred to other advisers. Amy recommended to which adviser each of his clients should be transferred. And then Covid struck.

Two unexpected staff changes this year were Liezle Mill's acceptance of a job offer which enables her to spend considerably more time with her newborn baby and

Cornel Steenhuis's decision to leave Finfoocus at the end of August. Their departure affects the group of Amy and Hannes's clients who have been transferred to them since 2018.

Amy postponed her final retirement and undertook to stay on at Finfoocus in a limited advisory capacity. She also remains a member of the Finfoocus investment committee and the Finfoocus Board. She is involved in the transfer of clients affected by Liezle and Cornel's departure. Amy and Hannes's former clients are welcome to contact her directly if they want to discuss the transition and choice of new adviser with her. Her institutional memory will continue to be available to assist advisers with information and advice as required.

The good news is that although the pandemic and political unrest continue to create stress and uncertainty, Finfoocus's clients can rest assured that our company is not only doing well, but is growing and our assets under management maintain a steady increase. We are still proudly independent and hold contracts with a wide range of product providers. None of our staff has lost their jobs due to Covid. To the contrary, we recently appointed two new staff members.

This would not have been possible without the trust and loyal support of our clients, and we thank you for it. The Finfoocus advisers and support staff will continue to keep your best interests at heart.

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