

Wealth and Asset Advisors - answers to questions you may have.

1. Will all existing advice and all current services remain valid?

All advice and services provided under the current FSP remain legally binding and we will carry that advice forward under the new licence.

2. How will my products and plans be transferred to the new FSP?

We will follow a legal process to transfer your products, plans, policies, and investments to the new FSP and will communicate with you throughout. We will send you “broker appointment” documents for your signature to give effect to the transfer.

3. How long will the transition into Wealth and Asset Advisors take?

Whilst the buy-out was finally concluded on 23rd June 2025, we have negotiated a 12-month transition period to give us time to consult personally with every client. During this time, we’ll remain mandated under the existing Wealth Associates FSP licence as well as being employed under our new FSP. This will allow us to provide uninterrupted advice and service to all of our clients.

In practical terms, very little will change apart from our FSP name, office telephone number and email addresses. All processes will be phased to ensure a smooth and seamless transition.

4. How does this transition affect our existing FSP licence number?

During the 12-month transition period, we will transfer clients over to the Wealth and Asset Financial Services FSP licence #9659. Legislation requires signed mandates to authorise product and investment transfers.

The Wealth and Asset FSP will have Jeremy and Sabra Squier as directors and Key Individuals, Ryan Vivian as Director of Operations and with shareholders across our advisors’ group.

- **New FSP details:** The new FSP will be Wealth and Asset Financial Services (Pty) Ltd, registered under FSP number 9659. We will trade as Wealth and Asset Advisors.
- **Background:** The Wealth and Asset FSP is a group licence that was originally registered in 2004 and was used by one of our colleagues to conduct her advisory practice prior to joining the group.

5. Can you explain the name change away from “Bespoke”?

Due to agreed contractual restrictions on using the word “Bespoke” in our name or branding, we’ve chosen to adopt **Wealth and Asset Advisors** as our trading name.

Rest assured that, while our name may be changing, our personalised, evidence-based approach to your financial plans remains the same and in-fact, we look forward to constant improvement under our independent banner.

6. What about succession planning?

One of the key reasons for our buyout is to retain the ethos, culture and method of advising and servicing our clients. Jeremy and Sabra as the “senior states-persons” intend to remain engaged in the business for some years and will continue the process of coaching our colleagues in our ways. We will continue to grow the business organically

The team organogram shows the addition of new staff members in pursuit of this, and we will continue to grow organically over the years.
