



Gradidge-Mahura
Investments approved
as a Professional Practice

Gradidge-Mahura Investments (GMI) was accredited by the Financial Planning Institute of Southern Africa (FPI) as an approved Professional Practice™.

The accreditation came after an extensive due diligence process by the FPI over a period spanning 6 months. The key criteria includes; advice process, evidence of acting in a fiduciary capacity, solvency, good corporate governance, sound financial management, advisers adhering to the FPI Code of Ethics and Professional Responsibility, the practice actively mentoring new entrants into the market, and the practice having at least 50% of advisers designated as Certified Financial Planners®. It was a very thorough and intrusive process as the FPI looked for evidence of any claims that we made.

The FPI is the leading independent professional body for financial planners in South Africa, and is a founding member of the international Financial Planning Standards Board (FPSB). GMI is now one of 12 financial planning practices in the country to be accredited, and is also the first black owned and managed practice with this designation. It is estimated that there are over 5,000 financial planning practices in South Africa, which makes this achievement even more significant.

Our motto as a company has long been **Independent. Professional. Confidential.** It is great that we have gone through a structured process which has found that we are indeed professional in our approach to dealing with clients. We accept that we will miss the mark from time to time and ask that you, our clients, take us to task when this happens. We are proud of this achievement, and understand that it places additional responsibility on us to maintain it. Thank you again for your ongoing support because without you we do not have a business.

The Team at GM Investments