



# Kim Potgieter

Author | Inspirational Speaker | Workshop Facilitator | Director and Head of Life Planning at Chartered Wealth Solutions

Kim Potgieter is considered one of South Africa's leading authorities on Financial Life Planning. Her life's work is to make magic in people's lives by aligning money with meaning to enable positive and powerful transitions. She encourages people to understand and embrace their relationship with money, so that they are ultimately able to change perspective and view money as an enabler in the fulfillment of goals, dreams and aspirations.

Kim is a Director and Head of Financial Life Planning at Chartered Wealth Solutions, a specialised retirement planning practice. She is a Certified Financial Planner®, a Registered Financial Life Planner, an accredited ICF (International Coaching Federation) Coach and New Money Story® Mentor Coach. Kim is well qualified to guide people in pursuing the life they truly desire – by helping them put their money in the right place. Her Industrial and Clinical Psychology degrees further enable her to assist clients in merging their money with meaning, bringing a fresh perspective to holistic life and financial planning.

Kim is passionate about meaningful conversations and understanding one's psychology or relationship with money. She believes that our relationship with money manifests in the type of decisions we make around money, investing and retirement. She views financial life planning as a holistic approach to understanding a client's financial values and history and guiding them into making healthy financial decisions.

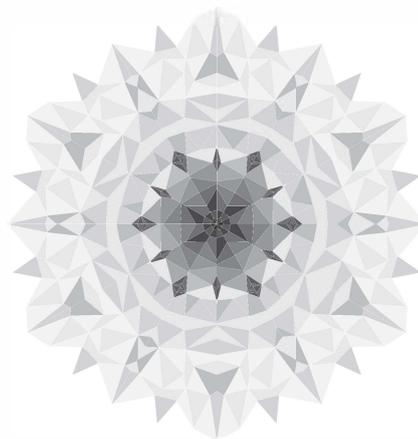
Kim's first book, *Retiremeant: Get More Meaning from your Money* (Jacana), followed the creation of a consumer retirement lifestyle website – [retiresuccessfully.co.za](http://retiresuccessfully.co.za) – that assists South Africans in creating their retirement plans. She is a sought-after inspirational speaker, author and workshop facilitator. Kim's personal website ([kimpotgieter.co.za](http://kimpotgieter.co.za)) contains online exercises and courses for a personal journey to money matters. She is also a regular voice on radio and has made several television appearances.

To support women in the industry, Kim established the Women in Finance Network ([wifn.co.za](http://wifn.co.za)), a networking forum for women in the financial services industry where members meet through organised events and are able to share experiences and learn from one another.

Kim is currently busy writing her second book that will focus on money journeys.

*If I could hold the kaleidoscope of life in my hands, and turn it, ever so slightly, precisely in tune to each individual I meet, to transform their specific life story into a fulfilling and significant life then I would be living my perfect life!*

*Kim Potgieter*



*"My life's purpose is to share my learning about money and assisting you to put money in it's right place – making sure that money enables you to live the life you really want to have. My vision is to shift the kaleidoscope that is "you", to create a beautiful image where money aligns perfectly with the pattern of your ideal world, enabling you to master your money matters to create a magical life adventure."*

**KIM**  
POTGIETER  
money  
+  
meaning  
=  
magic



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