



# 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 holistic Financial Planning in the retirement sector. Kim is passionate about merging a clients' goals and dreams with their Financial Plan to enable a life filled with inspiration and meaning.

Her life's work is to share her learning about the relationship we have with money, and to assist people putting money in its right place – making sure that money enables them to live the life they really want to have, a place where money aligns perfectly with the pattern of their ideal world.

As a Director and Head of Life Planning at Chartered Wealth Solutions, Kim is able to combine her two passions: studying the relationship people have with their money and advising people on how to get the most life from their money in Retirement™. She is a Registered Financial Life Planner, a CERTIFIED FINANCIAL PLANNER® professional, an accredited ICF (International Coaching Federation) Coach and a New Money Story® Mentor Coach. Her Industrial and Clinical Psychology degrees further enable her to assist clients in merging their money with meaning.

Kim's message is clear: by understanding your relationship with money, you can begin to shift your mindset to create positive and powerful transitions.

Kim is at the heart of Chartered Wealth Solutions' philosophy of a transformative process that starts with a client's life goals and then aligns their financial resources to enable their best possible life. She is a workshop facilitator, inspirational speaker, and active media personality, appearing on television, radio and social media channels, and is regularly invited to speak industry events.

Kim is passionate about meaningful conversations and understanding one's psychology or relationship with money and writes regular blogs - *Courageous Currency Conversations* - on this topic. She believes that our relationship with money manifests in the type of decisions we make around money, investing and retirement.

Kim is an accomplished author and her first book *Retiremeant: get more meaning from your money* (Jacana) was published in 2015. She has also written an e-book: *10 Retiremeant Truths*, and is busy compiling a series of e-books entitled the *Retiremeant™ What If's*.

Kim, together with Chartered Wealth Solutions, established a consumer Retiremeant™ lifestyle website: [retiresuccessfully.co.za](http://retiresuccessfully.co.za) which serves to support and inspire people who are in, near, or at Retiremeant™. Kim also founded the *Women in Finance Network*, a 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 a creative thinker who is exceptionally well read on international trends within holistic retirement and life planning. This enables her to bring a fresh global perspective to conventional financial planning methodology.

Kim is passionate about people. She is married to Gys and they have three children. Kim loves to cook, travel and read in her spare time.

*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!*

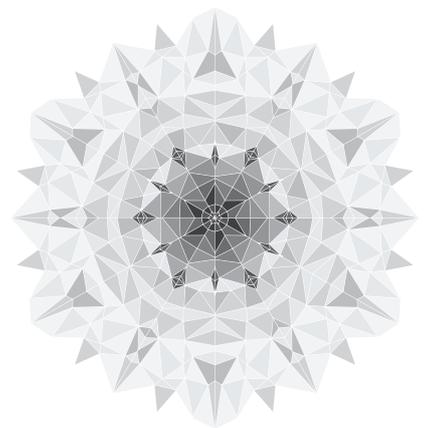
*Kim Potgieter*



**KIM**  
POTGIETER

money  
meaning  
mindshift

*"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."*



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