

DREAM

Ladies, do you want to lead the evolution of Financial Planning?

There are a group of female financial planners in the world today that feel deeply fulfilled doing the work they do to transform their clients lives by helping them shift from overwhelmed by their finances, to confident, on purpose and in control of them. These women are also well paid and on their own way to financial freedom.

Would you like to be one of them?

Would you like to be part of a fierce group of females leading the evolution of financial planning in South Africa?

ABOUT MY JOURNEY 2 FREEDOM

Everything we do is about Freedom.

My Journey 2 Freedom exists to help change-makers live financially free lives and fulfil their purpose whilst feeling confident about their choices and the direction they are headed.



MY JOURNEY
2 Freedom

We are a Lifestyle Financial Planning and Coaching business. We help our clients create a financial strategy and focus their attention on what is most important to them so that they can shift from overwhelmed by their finances, to confident, on purpose and in control of them.

We work with people that we call change-makers, ones that are up to something inspiring, with a vision to contribute something of value that will change the world in some way.

We're known for our independent, disruptive thinking that challenges the status quo and allows us to provide a neutral, fee-only and solutions-agnostic service.

Our clients are in control of their money and the direction their lives are headed. They report lowered feelings of anxiety and overwhelm, and increased confidence around decisions about how to spend their money.



MY JOURNEY
2 Freedom

www.mjfwealth.co.za
MJF Wealth (Pty) Ltd 2016/291702/07
An Authorised Financial Services Provider FSP48028

MY JOURNEY 2 FREEDOM VALUES

- **Freedom**

We believe that we, and our clients, have the right to be mentally, emotionally, spiritually and physically free.

- **Connection**

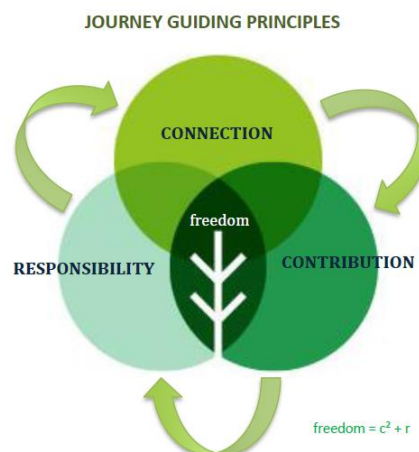
We believe in nurturing connection with ourselves, each other, our clients, and a higher power.

- **Contribution**

We believe in contributing something of value that will change our clients lives and as a result, the world, in some way.

- **Responsibility**

We believe in taking responsibility for ourselves and being aware of our responsibility to others.



VISION

The world today is volatile, uncertain, complex and ambiguous. Society teaches us that success means growth at all costs. We have lost connection with ourselves, with each other and with a higher power. In the male dominated financial services industry success is driven by sales and meeting sales targets where the client isn't the human but the human's money, and the success of a financial services professional is in the amount of products they can sell and assets they can gather.

We do not agree with the way the financial services industry operates presently. We are frustrated with the broken systems we have been forced into. We feel overwhelmed, but also inspired. We are tired of being told that we're entitled and that our vision for a better way of working is a fantasy.

We have a vision to lead the creation of a new world. Our vision of this new world is one of the wellbeing or sharing economy where success (freedom) will be measured through individual and collective connectedness, contribution and responsibility.

We are here to lead the way in creating this new world. Starting with viewing ourselves and our clients as the multi-dimensional humans that we are. A unique blend of mind, body and soul. Individuals with purpose and a gift to offer the world that will change the world in some way.

We believe that it is our purpose and responsibility, as female Lifestyle Financial Planners & Coaches, to empower and support our clients in a way that assists them to define their purpose, create a financial strategy to support their Life's journey and be a trusted partner and coach along the way.

MISSION

Our mission is to create a community* of change-makers** who are up to something. They are responsible disrupters who challenge the status quo through their independent thinking, feeling and actions. Our goal is to create a community where we are simultaneously free and connected, contributing and receiving value, responsible for ourselves and to each other.

Every member of our community has something to offer to the community, and the world, and a plan to help them do that. Together the community creates support, accountability and opportunity by offering a space to connect, share and create something bigger than our individual contributions as a result. Together the community will change the world.



*Community includes both My Journey 2 Freedom team and clients.

**We define change-makers as the ones that are up to something inspiring, with a vision to contribute something of value that will change the world in some way.

MY JOURNEY 2 FREEDOM PLANNER DESCRIPTION

An MJF Planner is known for their independent, disruptive thinking that challenges the status quo. MJF Planners are kind, compassionate and caring, for themselves, their colleagues, clients and their community.

We take our work seriously and we also believe that Life is about experiences and enjoying it to the fullest, so we value a way of living that honours work, rest, exercise and play. After all, everything we do is about freedom.

We are looking for women that break the mold of the average financial services professional. You're not average. You don't want to be average. You want to be part of an elite group of female financial planning and coaching professionals who deliver the kind of service and experience that transforms our clients lives, making a lasting positive impression on their hearts and their Life as well as their finances.

MJF Planners know that product solutions support a clients financial planning journey, but that they are secondary to the process of planning and coaching. MJF Planners understand that Lifestyle Financial Planning is a process and that it's more about the journey and experiences along the way than the destination.

MJF Planners believe in building deep relationships with their clients whilst they take them on a journey into their thoughts, feelings, beliefs and behaviour to help them create purpose and meaning for their money so that their money supports the journey of the Life they want to live.

ROLE DESCRIPTION

As an integral part of the MJF Planning & Coaching Team you will be responsible and accountable for the following:

- Sourcing clients
- Facilitating / co-facilitating the lifestyle financial planning process with clients which involves
 - Facilitating the generation of a client's Lifestyle Financial Strategy
 - Researching and Recommending Product Solutions that enable the client to implement their Lifestyle Financial Strategy
 - Implementing Product Solutions
 - Ongoing Coaching & Product Support
- Contributing to implementing and streamlining internal processes of the business
- Contributing to growth and development of other team members
- Contributing to growth and development of the business
- Complying with legal requirements of role (qualifications, experience, compliance etc)

REQUIREMENTS FROM YOU

Personal non-negotiables:

- Curious // you have a thirst for knowledge and are interested in people
- Growth mindset // you want to grow and continuously learn
- Authentic // you walk your talk and live what you believe and speak
- Coachable // you are open to feedback and committed to doing your own self-development work
- Team player // you want to be part of and contribute to a team
- Goal driven // you want to be part of building a business of value and sharing in the success and learning from the failures that result from such a journey
- Values alignment // you resonate with the values of My Journey 2 Freedom
- Vision alignment // you resonate with the vision for My Journey 2 Freedom
- Mission alignment // you resonate with the mission of My Journey 2 Freedom

Practical non-negotiables:

- You have your own laptop, smartphone and internet
- You have a car or are happy to get yourself around using Uber
- You can self-fund yourself for a minimum of your first three months

Advantageous:

- Financial Planning qualifications
- RFP™ / CFP® membership & accreditation
- Coaching qualifications
- ICF / COMENSA membership & accreditation
- Existing client database



WHAT WE OFFER YOU

- A fully regulated financial services provider within which to work as a fee-only Lifestyle Financial Planner & Coach
- A Lifestyle Financial Planning framework
- Lifestyle Financial Planning Training
- Coaching for Financial Planners Training
- Product Training & Supervision Program
- Income from Revenue Share as well as Gain Sharing (profit share)
- Expenses covered by the business:
 - FSB Levies
 - Annual Financial Statements Auditing
 - Professional Indemnity Cover
 - Technology solutions
 - Client Profiling solutions
 - Marketing material / branding
 - Admin support staff (eventually)
- Licensed for the following categories:
 - 1.1 Long-Term Insurance : subcategory A
 - 1.23 Short-Term Insurance : Personal Lines A1
 - 1.3 Long-Term Insurance : subcategory B1
 - 1.20 Long-Term Insurance : subcategory B2
 - 1.21 Long-Term Insurance : subcategory B2-A
 - 1.22 Long-Term Insurance : subcategory B1-A
 - 1.4 Long-Term Insurance : subcategory C
 - 1.5 Retail Pension Benefits
 - 1.7 Pension Fund Benefits (excluding retail)
 - 1.8 Securities and Instruments : Shares
 - 1.14 Participatory Interests in Collective Investment Schemes
 - 1.16 Health Service Benefits
- Contracts with the following service providers with the option to bring on more if needed:
 - Allan Gray
 - Sygnia
 - Stanlib
 - PPS Invest / Insurance / Profmed
 - Discovery Life / Health / Vitality / Insure / Invest
 - Momentum Myriad / Health / Invest
 - Liberty Life
 - Sanlam / Glacier
 - Turnberry Gap Cover
 - ZestLife Gap Cover
 - SA Bullion
 - Short-term referral partner: Kayser Baird
 - Integrative Enneagram Solutions
 - FinaMetrica



WHAT NEXT?

1. Take our online “Potential Team Fit & Readiness” Questionnaire here to see if you’re a fit and ready to take the leap and join our team.
2. Email us to tell us that you’re interested, or to ask any questions you may have that haven’t been answered or aren’t clear in this document or online : info@myjourney2freedom.com.
3. Share this document with any other female financial planners or coaches you know who are also change-makers that want to contribute something of value to change the world in some way, and who would be interested in being part of a collaborative group of women leading the evolution of the financial services industry in South Africa.

