



"My purpose is to inspire you to take control of your life and your money; and transition into a whole new chapter where money aligns with meaning."

Kim Potgieter

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

Kim is an author, speaker, voracious learner and expert financial planner.

She believes that you cannot plan for your money without planning for your life first and advocates that life planning is an integral part of financial planning. This allows her clients to live their best possible lives by aligning their money with purpose and meaning.

As Director and Head of Life Planning at Chartered Wealth Solutions, she is able to combine her two passions: helping people with their relationship with money and guiding clients to get the most life from their money in their second chapter.

As an author, Kim has written three eBooks and two books, *Retirement – get more meaning for your money* (2015), and her latest, *Midlife Money Makeover* (2021). Her message is clear; by understanding your relationship with money, you can begin to shift your mindset to create positive and powerful transitions.

Kim is an inspirational speaker and active media personality and is regularly invited to speak at events. Using her Money, Meaning, Mindshift approach, she shifts individuals and groups to pay *attention* to their lives and give intention to their money.

As a voracious learner, Kim is a Registered Financial Life Planner, a CERTIFIED FINANCIAL PLANNER® professional, an accredited ICF (International Coaching Federation) Professional Coach, a Dare to Lead™ Facilitator and a New Money Story® Mentor Coach. Her Industrial and Clinical Psychology degrees further enable her to assist clients with their relationship with money and changing money habits that don't serve them.

Kim has literally travelled the world meeting with visionaries and mentors to bring to her clients new ideas and insight on how to design a life that they're excited to live and, making sure that money is where it needs to be – as a friend, not a foe. "Money is meant to enable you to live the life you dream of having," says Kim.

Kim is passionate about empowering people to give intention to their money and live with purpose, on purpose.

"When it comes to money. Be inspired. Be brave. Be on purpose."

Accreditations

CERTIFIED FINANCIAL PLANNER® Professional | Registered Financial Life Planner | Professional Certified Coach (International Coaching Federation) | Certified Dare to Lead™ Facilitator | New Money Story® Mentor Coach | (BSocSci) Clinical & Industrial Psychology

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money | meaning | mindshift

