



Kim Potgieter

Kim is an author, speaker, voracious learner and expert Financial Planner. She believes you can only plan for your money if you plan 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 combines 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 five eBooks and two books, *RETIREMEANT – Get More Meaning for Your Money* (2015) and *Midlife Money Makeover* (2021). Her message is clear: by understanding your relationship with money, you can shift your mindset to create positive and powerful transitions. Tap into some of her wisdom from this book and other related topics at kimpotgieter.com

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 they're excited to live and ensuring that money is where it needs to be – as a friend, not a foe. Her passion is to empower 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

KIM POTGIETER

money | meaning | mindshift



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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.