



Kim Potgieter

Author | Speaker | Workshop Facilitator | Financial Planner
Managing Director at Chartered Wealth Solutions

Kim is an author, speaker, voracious learner, and expert financial planner who has spent her career helping people use their money to build lives they are excited to live. Her work is guided by one simple belief: the best financial plan starts with your life.

As Managing Director at Chartered Wealth Solutions, Kim helps people navigate some of life's biggest transitions, from midlife and changes in work or family life to retirement and unexpected life events.

Her work brings together financial planning, life planning and a deep understanding of our relationship with money. Kim is particularly interested in the beliefs, experiences and stories we carry about money, and how they show up in the way we earn, spend, save, invest and make decisions. Understanding where these beliefs come from gives us the opportunity to make different choices, give greater intention to our money and use it to support what matters most to us.

Kim is the author of *RETIREMEANT – Get More Meaning from Your Money* and *Midlife Money Makeover*, as well as several eBooks and practical resources exploring money, purpose, transitions and intentional living.

As a lifelong learner, Kim has travelled the world meeting thought leaders, visionaries and mentors, bringing new ideas and perspectives into her work with clients, readers and audiences. Her curiosity continues to shape how she thinks about money, life and what it means to live well.

Her passion is to help people give intention to their money and live with purpose, on purpose.

When it comes to your money, be inspired, be brave, and 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

*Be inspired to
realign your life and
money to live with
greater freedom,
joy, and intention.*

