

A man in a blue suit and patterned shirt stands on a city street, smiling. The background shows a building and a blue trash can.

# BUSINESS REPORT

Date: **15th September 2025**  
Business Reference: **BFS00092**

About the Business:

## Full Ownership or Shares in Major Financial Groups

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You have the opportunity to acquire a majority interest or full ownership in a well-established, highly diversified SA financial services group.

Founded over nearly thirty years ago, this business has grown into a recognized national platform with a strong reputation across multiple complementary verticals. The group maintains a significant operational footprint including inter alia employee benefits, umbrella fund administration, private client wealth management, insurance advice, health care consulting and tailored financial wellness programs for employer groups.

The company complies with all the relevant legislation.

The company delivers substantial recurring revenue streams with low capital expenditures requirements.

Financials:

Turnover R180 million for 2025.

NP (EBITDA) R25 million for 2025.

Projections for 2026- Turnover R200 mill, NP (EBITDA) R40 million.

The company manages about R8,5 billion in client assets, and overseeing a broader R42 billion assets under gatekeeping.

Revenue composition is heavily weighted towards stable, predictable income, with the majority derived from its core financial services.

Full information can be revealed to pre-qualified interested parties.

Selling price:

A buyer can purchase the whole business for R175 million or obtain shares in the company after successful negotiations.

## Full Ownership or Shares in Major Financial Groups



Sector: Sales & Services

Asking Price:

R 175,000,000

Monthly Profit:

R 0

Asset Value:

R 0

Stock Value:

R 0

Yearly Net Profit :

R 0

