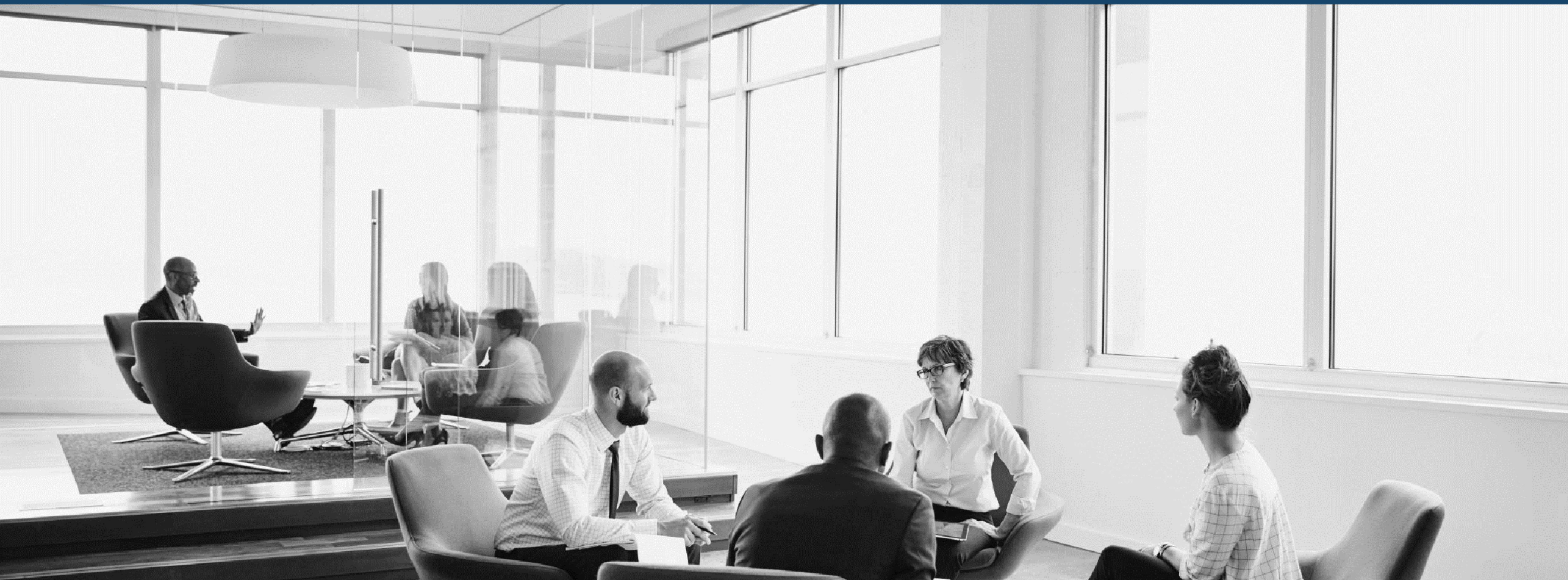
A PARTNERSHIP FOR ENTREPRENEURIAL FINANCIAL PLANNERS

Build Your Business.

With the Structure to Grow Sustainably.

A partnership platform for entrepreneurial financial planners who want independence, professional support, and a more sustainable foundation for growth.



THE GFP PARTNER PROPOSITION

Independence should not mean doing everything alone.

Entrepreneurial financial planners build their businesses around trust, insight, and long-term client relationships. Yet the business of advice has become more demanding. Compliance is more complex. Administration takes time. Technology decisions require attention. Investment processes need oversight. Clients expect a consistent and professional experience.

Galileo Financial Planning (GFP) provides entrepreneurial financial planners with the structure to build sustainably while protecting the personal relationships that made their businesses valuable in the first place.

You remain close to your clients. Your advice remains personal. Your business gains the backing of a professional platform.

Enhance client relationships. Strengthen the business.

Why financial planners consider GFP

- They want to grow without carrying every operational burden themselves.
- They want access to integrated systems, technology, investment support, and administration.
- They want to protect long-term enterprise value and create succession options.
- They want more robust compliance, governance, and risk management support.
- They want a more consistent client experience.
- They want a professional partner that respects their entrepreneurial drive.

THE GALILEO STORY

Built around quality advice, structured support, and lasting relationships.

Galileo Financial Planning has a clear belief: financial planners do their best work when a reliable operational and administrative platform supports them.

Clients no longer need only product recommendations. They need thoughtful planning, careful implementation, reliable administration, clear governance, and guidance through life transitions. Financial planners require a business model that can support that level of care over the client's lifetime.

GFP exists to help financial planners meet that standard without carrying the full operational burden alone. We provide the support behind the advice, so financial planners can focus on their client relationships, expertise, and guidance that clients value most.

Who we partner with

Experienced financial planners

Financial planners who have built clients' trust and want a more sustainable platform for the next stage of growth.

Entrepreneurial professionals

Financial planners who want to lead their own business while operating within a professional framework.

Client-focused financial planners

Professionals who care deeply about continuity, reputation, and long-term client outcomes.

Business builders

Financial planners who think beyond short-term income and want to build lasting enterprise value.

A BETTER QUESTION

The real question is not whether you can build independently; It is what structure gives you the highest probability of building a sustainable financial planning business.

WHAT THE PARTNERSHIP DELIVERS

Continuity for clients. Support for the financial planner. Structure for the business.

The GFP model is built around continuity plus structure. Clients continue to work with the financial planner they know and trust. The financial planner gains a sustainable platform behind the advice. The business becomes more resilient, more scalable, and easier to manage.

More time for deepening client relationships

When you have the right support behind your business, you have more time to sit in front of your clients.

A defensible advice framework

Clear standards, documented processes, and consistent governance help protect the client, the financial planner, and the business.

Operational efficiency

Structured administration, reporting, financial planning processes, and client service workflows reduce friction and improve follow-through.

Technology that supports advice

Integrated systems, financial planning tools, CRM capability, risk profiling, and business intelligence support clear decisions.

Investment and portfolio support

Research, oversight, and portfolio construction processes strengthen the quality and consistency of the advice experience.

Long-term stability

Succession planning, practice management support, and scalable infrastructure help protect client continuity and enterprise value.

STRUCTURED SUPPORT

Support across every area of your business.

GFP provides the support behind the advice. The aim is simple: Reduce the operational pressure on the financial planner and strengthen the quality, consistency, and resilience of the business.

Governance and compliance

Clear oversight, advice standards, risk management, compliance support, and professional indemnity cover.

Technology and systems

CRM, financial planning software, risk profiling, reporting, workflows, and data that help you manage the business.

Practice management

Operational consulting, efficiency implementation, business coaching, and client experience design.

Finance and administration

Fee and commission reconciliation, payroll support, expense oversight, and financial clarity.

Human resources

Employment contracts, performance frameworks, leave administration, and people-management support.

Marketing and brand

Operate within an established and respected brand, supported by coordinated communication and media presence.

Training and development

Systems training, financial planner development, practice support, and structured learning for growth.

Succession planning

Internal and external successor pathways, transition design, client continuity planning, and enterprise value protection.

You remain the entrepreneur. We provide the foundation.

THE CLIENT EXPERIENCE

Your clients stay at the centre.

A transition to another financial planning business must be handled with care. Clients need clarity, confidence, and reassurance. GFP supports partners with a clear transition process and practical communication tools, so clients understand what is changing and what remains consistent.

The message to clients is simple

- They continue working with the financial planner they know and trust.
- The financial planner gains comprehensive support behind the scenes.
- The client experience becomes more consistent.
- The relationship remains personal.
- The advice process becomes more robust.
- The transition is guided, explained, and carefully managed.

> *Your clients do not lose the relationship they value. They gain the benefit of a sustainable advice platform behind it.*

Support through the move

GFP helps partners approach the transition professionally by providing client communication support, administrative guidance, documentation support, onboarding steps, and a clear process for explaining the benefits of the move.

The result is a transition that feels personal, organised, and well-managed.

THE OUTCOME

A stronger platform for the business you want to build.

Professionally structured

A business supported by clear governance, documented processes, and consistent operating standards.

Commercially sustainable

A business with capable systems, practical support, and more efficient administration.

Client-centred

A model that keeps the financial planner-client relationship at the centre of the value proposition.

Built for the long term

A platform designed to support growth, succession, continuity, and long-term enterprise value.

A conversation worth having

If you are considering the entrepreneurial route or if your current practice or business needs more support for its next stage of growth, GFP offers a practical and professional path forward.

You do not need to build alone. You can keep the relationships that matter and gain the structure your business needs to be sustainable.

galileo financial planning

To explore a partnership opportunity, contact ask@galileocapital.co.za to arrange a confidential exploratory conversation.