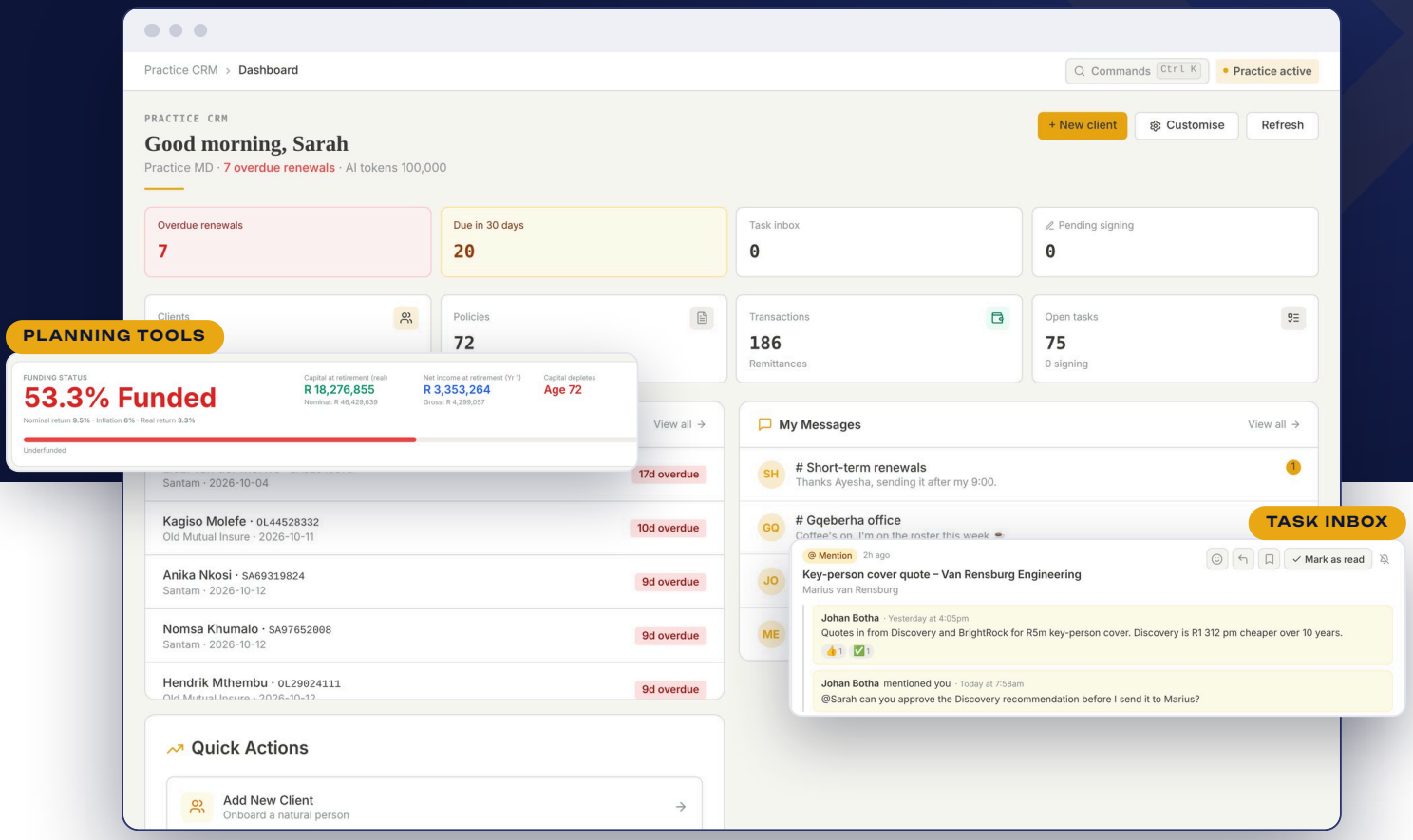
WEALTH STAKR

Practice software for South African advice firms

Your whole advice practice. One platform.

Clients, compliance, commission, renewals, planning and your team's work — in one place, for one practice or a whole group. Built inside a working South African advice practice.



Sound familiar?

- ✕ Client details in the CRM, documents in shared folders
- ✕ Commission reconciled in spreadsheets every month
- ✕ Renewals tracked from memory and sticky notes
- ✕ Work lost in someone's email inbox
- ✕ Compliance chased file by file before an audit

With Wealth Stakr

- ✓ One client file that holds everything
- ✓ Statements imported, matched and split per adviser
- ✓ Every renewal listed, with quotes compared side by side
- ✓ Every task assigned, tracked and visible
- ✓ A compliance folder per policy, checked before submit

Stop running your practice on five different tools.

Book a demo →

WHAT'S INSIDE

Everything a practice runs on, on one client file

Real screens from the product, shown on a fictional demo practice. Nothing to stitch together, no exports between systems.

Client onboarding

Capture a client once. Policies, documents, relationships and FICA sit on one client file.

Tasks & task inbox

Assign work to people, reuse templates for repeat jobs and follow every update in one inbox.

Short-term renewals

See what is due and overdue, compare insurer quotes side by side and send to the client.

Compliance & ROA

A compliance folder per policy, an automatic completeness check and an ROA builder.

Commission & adviser pay

Import provider statements, match them to policies and run each adviser's pay from the splits.

Planning & calculators

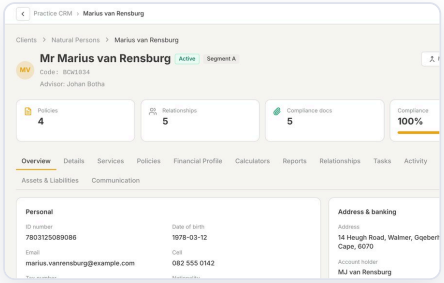
Financial profile, retirement gap, dependants, estate liquidity, CGT and cover projections.

Leave & time

Leave requests, approvals and balances, plus time tracked against tasks and clients.

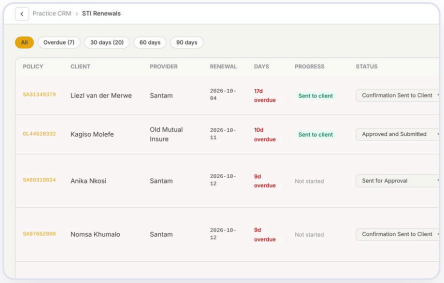
Ask Stakr

An AI assistant that answers in plain language from your own client book.



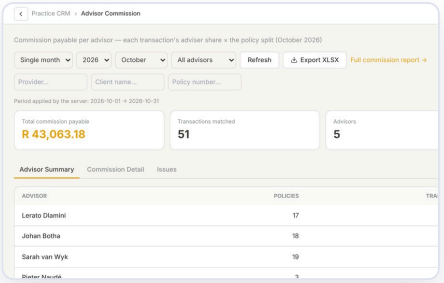
The client file

Everything about a client, one click away.



Renewals

Due and overdue, with status and owner.



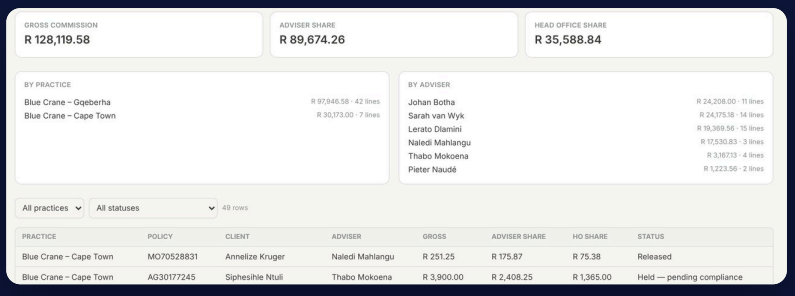
Adviser commission

Each adviser's payout, policy by policy.

RUNNING MORE THAN ONE PRACTICE?

Add Head Office and see across every practice.

- Practice health, users and activity for the whole group on one screen.
- Head office signs off each policy's compliance file — commission is released only once it's approved.
- Commission received, split by practice, adviser and head office share.



Head office › Commission received

Each practice's data kept apart
Enforced in the database itself.

Roles and permissions
Down to an adviser's own book.

Invitation-only access
Nobody signs themselves up.

Full audit trail
Head office access is reasoned, timed and visible.

See it with your own practice in mind.

Book a demo and we'll walk you through the platform using the way your practice works today.

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www.wealth-stakr.co