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Beyond RDR (Pty) Ltd

Beyond RDR is an International coaching and consulting business which runs events and training programs for financial advice firms.

We're known for leading the development of Independent Financial Advisers and our aim is to leave people feeling inspired, and confidently 'up to something important.'

Vision:

Everything we do is about responsible freedom, and improving human outcomes.

We see a world where people are not constrained by the world's broken systems – one where they get to understand their God-given purpose, and get to responsibly follow their individual version of whatever freedom means to them.

Mission:

To increase the number, quality and sustainability of client-centred 'lifestyle' financial planners who are equipped and empowered to transform the way people think and behave around money.

The problem we're trying to solve

Society has created a framework for our lives which is full of broken systems that do not serve us. Politically, economically and socially, these systems are breaking down and create huge problems.

We operate in the broken world of financial services, and specifically in the financial advice and wealth management sector.

Financial advisers have never been trained to be financial planners or to run a business. We've been trained and incentivised to sell the financial services industry's products, and fundamentally, we believe most advisers are having the wrong conversations with their clients.

There are three key themes driving change in financial services:

1. Changing regulation and a push for transparency
2. Lack of public trust in the financial services industry
3. Technological development which presents the risk of disintermediation

Without change, many financial advisers are in danger of losing clients, becoming irrelevant and going out of business. Advisers need to understand that what they have is a business model problem, not a regulation problem. Many of them are trapped inside a self-serving system that perpetuates an illusion of freedom that isn't real.

They need a business model that supports a completely different narrative.

Our solution

We provide coaching and consulting services, and run a workshop-based development program called The Stage 4 Accelerator.

The program comprises a one-day, stand-alone "Future Financial Planner" workshop, together with the 5 month, 5-module coaching program which takes advisers through the process of adapting their value proposition. This experience supports a different conversation and enables advisers to deliver a service their clients willingly pay for.

About us

Beyond RDR was created by Brian Foster, who has been a financial planner for over 30 years. He owned and managed two successful UK financial planning firms, has been charging fees for advice since 1997 and has been advising and coaching financial advisers since 2012.

Brian is the author of the book ["Keep Calm & Survive RDR"](#). He speaks at International conferences, is regularly published in the media, and was invited onto the judging panel for a global financial planning competition.

Who we work with

Beyond RDR (Pty) Ltd works with a wide range of Financial Services Providers, Media organisations, Asset Managers, Compliance Consultancies and small advice firms.

We're at our best working with small, forward-thinking independent financial planning firms, who want to build a sustainable business that delivers a truly client-centred world-class service.

