



TRUST IN THE HYBRID AGE

Trust does not happen overnight. It takes years of keeping your promises, staying in touch, and helping your business partners achieve their business objectives. But it only takes a wrong word or action to break.

In a world that has gone digital, building trust has become an even greater challenge as we see less of our financial advisers in person and have more engagements through technology. And let's be honest: It is much easier to feel a person's "energy" when you are with them physically, versus seeing them on a screen or hearing their voice over a phone. Not to mention the impersonal and jargon-filled emails, which most people probably never read. So, how do we build lasting trust so that our business partners and clients keep supporting us?

At Momentum Investments, we believe that by combining state-of-the-art, ever-evolving technology with the expertise, skills and heart of humans, we build the much-needed trust in a hybrid world. We also firmly believe that investing is personal – when you tailor-make services and products that work, you build trust. Ultimately, you can break it down into different types of trust, which combine to create an overall trusting relationship.

Building technological trust

These are the ways we use technology to help us build trust between us and our business partners...

Transparency: We are open and honest with our business partners, so they know that nothing is hidden, and they won't get any (nasty) surprises.

Configurability: Our future investment platform will be configurable so that we can offer our business partners a personalised experience. This means that they can help their clients with very specific needs and goals. When you get personal with plans, your client trusts that you know them and have their interests at heart. Today, our proposition is probably the broadest in the South African investment market to help advisers build personalised investment solutions for their clients.



Reliability: When partnering with an investment platform that is reliable, always on and has all compliance sorted, you can focus on your clients and build your practice.

Building human trust

Here's how humanness helps us build trust with our business partners...

Co-creation: We work together and collaborate with our business partners to help them make their clients' investment dreams and life aspirations come to life.

Constant, personal contact: We always aim to communicate with our business partners in understandable language and through their channel of choice – communication that speaks specifically to our business partners' needs and dreams shows them that we pay attention and have deeper insight into their world.

Care: Kindness, friendliness, generosity, and empathy go a long way in building trust. These human emotions or actions cannot be replicated by a machine. Our personality and expertise are still our most valuable and profitable asset.

We believe our partnership with the award-winning, global investment platform FNZ will build on the trust relationship that we have already established with our business partners. Doing business with us digitally is already easy, fast and secure, but will become even more personalised with endless possibilities as we rapidly advance our technology stack. We will never lose the human touch, as investing with us will always stay personal. In fact, we believe that the future lies in singular personalisation. In other words, we give you the unique attention that you deserve on your and your clients' journey to success. 🌟

My top 10 tips for building trust

1. Do what you say you will do.
2. Keep your clients informed.
3. Show your clients that you care.
4. Personalise your communication and feedback.
5. Be transparent.
6. Drop the jargon.
7. Create experiences, not just services or products.
8. Co-create your clients' plan and objectives.
9. Partner with a platform that works seamlessly and will be future-fit.
10. Use easy, fast and secure technology to do manual work so that you can spend your time on building the value of your business and growing the wealth of your clients.