CONFIANCE
WEALTH & ADVISORY

Trusting Relationships. Creating Legacies.

INDEPENDENT MULTI-FAMILY OFFICE & STRATEGIC WEALTH ADVISORY

Confiance Wealth & Advisory is an independent, client-capped multi-family office based in Cape Town, serving entrepreneurial and legacy-minded families locally and globally, primarily through referral and long-term relationships.

We act as long-term strategic partners, helping clients structure, co-ordinate and steward complex balance sheets across jurisdictions and generations.

Our role is not to sell products, but to provide clarity, structure and disciplined oversight.

OUR ROLE IN YOUR WORLD

We sit at the centre of your financial ecosystem, helping align legal, tax, investment and fiduciary structures into one coherent strategy.

Our core responsibilities include:

Strategic Balance Sheet Architecture
Structuring assets, liabilities and transactions across entities, trusts and jurisdictions to ensure resilience, efficiency and long-term alignment with your family's objectives.

Investment Oversight & Manager Co-ordination
Providing independent oversight of investment strategy and assisting clients in evaluating recommendations from appointed discretionary investment managers and other specialist providers, ensuring alignment with the broader balance sheet strategy and long-term family objectives.

Estate, Trust & Succession Planning
Designing and overseeing structures that preserve and transition wealth responsibly across generations.

Cross-Border Structuring & Co-ordination
Working alongside accounting, legal and tax advisors to ensure seamless structuring and implementation across jurisdictions.

Strategic Transaction & Deal Structuring
Supporting clients through significant financial decisions including property acquisitions, liquidity events, funding arrangements and business transactions. These moments are structured carefully within the context of the broader balance sheet and long-term family strategy.

Fiduciary Oversight
Acting in trustee and executor capacities where appropriate, providing continuity, discretion and accountability.

Intergenerational Stewardship & Governance
Supporting families in building governance frameworks, aligning family values and preparing the next generation for leadership and responsibility.

OUR MODEL

We operate through:

- Ongoing retained strategic advisory
- Discrete structuring mandates and complex transactions
- Long-term fiduciary oversight

This layered model ensures continuity, accountability and depth of engagement without institutional bias or product-driven influence.

We remain intentionally client-capped to preserve discretion, quality and meaningful involvement.

WHO WE SERVE

We advise entrepreneurial and legacy-minded individuals and families who:

- Value independence and objective counsel
- Require coordination across multiple advisors and jurisdictions
- Are navigating complexity, including liquidity events, property acquisitions, succession planning or cross-border structuring
- Seek long-term stewardship rather than transactional advice

WHY CONFIANCE

Independent by design
Free from product sales, asset-gathering mandates or institutional bias.

Strategic depth
More than 25 years of experience structuring both sides of complex balance sheets across leading global institutions.

Client-capped engagement
Deliberately selective to ensure depth, discretion and attention.

Calm problem-solving
Complexity distilled into structured, practical solutions.

Guided by Treating Customers Fairly (TCF) principles
Integrity and accountability underpin every engagement.

MEET GENEÉ TAYLOR BENNETT
Founder & Principal

With more than 25 years of experience across Investec, Standard Bank and Julius Baer, Geneé has advised high- and ultra-high-net-worth individuals, families and businesses on complex wealth structuring and intergenerational planning.

Her expertise spans balance sheet architecture, investment oversight, cross-border coordination and fiduciary roles.

Confiance was founded intentionally — to provide independent, relationship-led strategic advisory without institutional constraint.

She serves as a strategist, problem solver and long-term steward to a select group of families.

BASED IN CAPE TOWN | WORKING GLOBALLY