Charlene Prinsloo

Managing Director

Charlene is an experienced financial services professional with a strong background in wealth management and investment strategy. She was previously the Managing Director of AlphaWealth, a leading national wealth management firm, where she played a key role in business growth, client engagement, and operational efficiency. As a seasoned wealth manager and Key Individual, she has expertise in discretionary asset management across both traditional and alternative investments, along with a solid track record in client acquisition, retention, and regulatory compliance.

She holds an Honours degree in Financial Management from the University of Pretoria and a Postgraduate Diploma in Financial Planning from the University of the Free State. Charlene is also a CFA Charterholder and a Certified Financial Planner.

Throughout her career, she has worked with leading financial institutions, including Consolidated Financial Planning, Ninety One (formerly Investec Asset Management), and Allan Gray. Her broad industry experience and practical approach have made her a trusted professional in the wealth management space.

Education

CFA Charterholder (2019) | CFA Institute

Certified Financial Planner (2014)
Financial Planning Institute of South Africa

Postgraduate Diploma in Financial Planning (2013)
University of the Free State

BCom Honours Financial Management Sciences (2010)
University of Pretoria

BCom Financial Management Sciences (2009)
University of Pretoria

Work Experience

AlphaWealth – 2015-2024

- Managing Director (2022-2024)
  - Responsible for implementation of the strategic direction of the Wealth Management business and the Fiduciary business
  - Managed daily operations, focusing on efficiency, team collaboration and process improvements
- Head of Wealth Management (2020-2022)
  - Led the Wealth Management team of 16 Wealth Managers and Paraplanners, overseeing the management of approx. R10 billion in assets under management.
- Wealth Management Executive (2018-2022)
  - 2IC to the Managing Director, supporting the executive team in the changing direction of the Wealth Management business at the time.
- Wealth Manager (2015-2024)
  - Managed a client book of approx. R900 million from 2015 to 2024, predominately discretionary assets, following a lifestyle financial planning approach.

Consolidated Financial Planning – 2012-2015

- Financial Planner (2012-2015)

wealth associates

carmel wealth