

Legacy in motion: Carl Coetzee appointed as a managing director within the Capital Legacy group

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Carl Coetzee, the charismatic industry leader and former CEO of BetterBond, has joined Capital Legacy to head up their sales and distribution division.



As an accomplished c-level exec with over 20 years' experience in the financial services industry, Carl is a game changer – making him the perfect fit.

Carl is not only an advocate for high-performance dynamics, but also a leader adept at managing and rallying large teams towards overarching corporate objectives.

The right stuff

“ You can copy any product but what you can't copy is service. ”

Capital Legacy is South Africa's #1 wills and estates specialists, has helped over 650 000 South Africans to get their wills in place, and is supported by thousands of financial advisors across the country. Carl firmly believes in the transformative power of the will and considers it a vital tool for securing a legacy.

His vision goes beyond the transactional aspects of the insurance industry. To him, the originality of Capital Legacy's service lies not only in their pioneering solutions but also in their exceptional customer support and attention to detail.

His deep roots in the world of financial services have fostered a profound understanding of the intermediary market and a genuine love of the industry. Another one of Carl's passions is relationships. “Relationships are the cornerstone of any business. It's a big deal to me,” he says.

"You can copy any product but what you can't copy is service," he says, and Capital Legacy's stats continue to show that they are unmatched in this field. Carl is dedicated to strengthening Capital Legacy's financial advisor support network, taking it to even greater heights.

Championing the cause

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Carl's personal life is as dynamic as his professional one. When not navigating the intricate world of insurance operations, he channels his energy into triathlons, which showcases his determination and discipline. His personal "why" revolves around his two sons, the driving force behind his dedication to providing for their future.

Carl champions the cause of providing peace of mind and avoiding unnecessary drama in people's lives. His passion aligns seamlessly with Capital Legacy's mission – to make the loss of a loved one easier: "I feel I'm where I belong," Carl adds.

Carl has been a Capital Legacy client himself for several years and initially crossed paths with Capital Legacy when he had his own will drafted via his financial advisor.

With his drive to infuse fresh energy into Capital Legacy's commitment to making the loss of a loved one easier and leading with passion, he is dedicated to the belief that every South African should have a valid will.

“ Off the back of an extraordinary year of exponential growth and groundbreaking partnerships, I'm proud to announce this appointment. I believe Carl is going to help us in reshaping the future of Capital Legacy. ”

– Alex Simeonides, CEO, Capital Legacy

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