

Brendan Gace
Financial Planner. CFP®



Personal Profile



OPERATIONAL REGION

Johannesburg, Gauteng.

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EDUCATIONAL BACKGROUND

- BA. LLB (University of Natal, University of Pmb)
- CFP (University of the Free State)

PROFESSIONAL TRAINING EXPERIENCE

- Certified Financial Planner. CFP®
- RFP1 2004
- RFP 2005
- FPI Member

EXPERIENCE

I was employed as a Financial Advisor at Sage Life 2000 to 2003 and then Sasfin Bank 2003 and 2004. I was employed at Pioneer Financial Planning since 2004, Currently I am employed as CEO; Key Individual and Financial Planner.

AREAS OF EXPERTISE

- Risk Planning
- Tax Planning
- Investment Planning
- Holistic Financial Planning
- Estate Planning
- Offshore Investments
- Wills

PRODUCT RANGE

- Life Assurance
- Endowments-Local and Offshore
- Income Disability
- Retirement Annuities
- Dread Disease
- Preservation funds
- Capital Disability & Impairment
- Unit Trusts
- Funeral Cover & various ancillary benefits
- Single Premium Investments-Local & offshore
- Various Income & Annuity Plans