

David te Brake
Financial Planner.



Personal Profile



OPERATIONAL REGION

Johannesburg, Pretoria & Rustenburg.

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David's Articles

The Tea Break

EDUCATIONAL BACKGROUND

- **2005 - 2007** University of Johannesburg, Johannesburg
 - Bcom Finance
- **2009 - 2010** University of Johannesburg, Johannesburg
 - Bcom Honours, Financial Planning
- **2009- 2010** University of Johannesburg, Johannesburg
 - N. Diploma Investment & Portfolio Management
- **2009 - 2010** University of Johannesburg, Johannesburg
 - Certificate in Financial Markets

PROFESSIONAL TRAINING EXPERIENCE

- **March 2010** Liberty Life Broker Accreditation.

EXPERIENCE

- **Jan 2010 to current** Financial Planner at Pioneer Financial Planning.

AREAS OF EXPERTISE

- **Investments** SA domestic markets including Unit Trusts, Endowments, Share portfolios and exchange traded funds
- **Medical Aid** Discovery Health Medical Aid
- **Comprehensive Financial Planning** Involves completing Financial needs analysis

ACCREDITATIONS

David is Accredited with and can sell products from the following suppliers:

