

Marcelle Lundie
Financial Planner



Personal Profile



OPERATIONAL REGION

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EXPERIENCE

I have been involved in offshore trusts, investments and banking for eleven years.

AREAS OF EXPERTISE

- Risk planning
- Investment Planning
- Holistic Financial Planning
- Offshore Investments

PRODUCT RANGE

- Life Assurance
- Endowments-Local and Offshore
- Income Disability
- Retirement Annuities

- Dread Disease
- Preservation funds
- Capital Disability & Impairment
- Unit Trusts
- Single Premium Investments-Local & offshore
- Various Income & Annuity Plans