

# *Personal Profile*



## **OPERATIONAL REGION**

Johannesburg, Gauteng.

**Offices:** 5 Sturdee Avenue  
Rosebank  
Johannesburg

**Contact:** Office: (011)880-4710  
Fax: (011) 880-5545  
E-mail: [martins@pioneer.co.za](mailto:martins@pioneer.co.za)

## **EDUCATIONAL BACKGROUND**

- B. Proc (Wits)

## **PROFESSIONAL TRAINING EXPERIENCE**

- AFP™
- FPI Member

## **EXPERIENCE**

I have been involved in Financial Planning since 1983.

## **AREAS OF EXPERTISE**

- Risk Planning
- Tax Planning
- Investment Planning

- Holistic Financial Planning
- Estate Planning
- Administration of Deceased Estates
- Wills

## **PRODUCT RANGE**

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- 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