

Michael Collocott
Financial Planner. CFP®



Personal Profile



OPERATIONAL REGION

Johannesburg, Gauteng.

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EDUCATIONAL BACKGROUND

- BA
- Postgraduate Diploma in Financial Planning
- Advanced Diploma in Estate and Financial Planning

PROFESSIONAL TRAINING EXPERIENCE

- Certified Financial Planner. CFP®
- FPI Member

EXPERIENCE

I have been in the industry for five years, advising on Financial and Investment Planning.

AREAS OF EXPERTISE

- Risk planning
- Tax Planning
- Investment Planning
- Holistic Financial Planning
- Estate Planning
- 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
- Medical Aid
- Various Income & Annuity Plans