

Personal Profile



OPERATIONAL REGION

Johannesburg, Gauteng.

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Rosebank
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EDUCATIONAL BACKGROUND

- Bsc Electrical Engineering (Wits)

PROFESSIONAL TRAINING EXPERIENCE

- Certified Financial Planner. CFP®
- FPI Member

EXPERIENCE

I have been employed at Pioneer Financial Planning for five years.

AREAS OF EXPERTISE

- Risk planning
- Tax Planning
- Portfolio management

- Investments
- Estate Planning
- Wills

PRODUCT RANGE

- Life Assurance
- Endowments - Local and Offshore
- Income Disability
- Retirement Annuities
- Dread Disease
- Preservation funds
- Capital Disability & Impairment
- Unit Trusts
- Medical Aid
- Single Premium Investments-Local & offshore
- Various Income & Annuity Plans