



OLDMUTUAL

OLD MUTUAL PERSONAL FINANCIAL ADVICE

MXOLISI ALFRED SIBAYA
EXECUTIVE FINANCIAL ADVISOR



DO GREAT THINGS EVERY DAY

MY BIOGRAPHY



PROFESSIONAL EXPERIENCE

Experienced Financial Advisor with a demonstrated history of working in the financial services industry. Skilled in Estate Planning, Retirement Planning, Investment Management, Risk Management, Customer Service, Long and Short-term Insurance. Strong finance professional with a Postgraduate Diploma in Financial Planning from University of the Free State. I am a Certified Financial Planner® professional, a professional member of the Financial Planning Institute of Southern Africa.

I have studied at various institutions of higher learning including the University of Cape Town; University of South Africa and the University of the Free State just to name a few.

I am currently employed as an Executive Financial Planner with Old Mutual PFA after joining the organisation in 2013. I really enjoy working with my clients, meeting their families and helping them to achieve their financial goals. Many of my clients have become more than clients, they are now friends and family. Building lasting relationships with everyone I interact with is paramount to me.

CONTACT DETAILS

Office number : 012 346 9628

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QUALIFICATIONS

The Insurance Institute of South Africa

Certificate of Proficiency (1999)
Intermediate Certificate in Business Studies (1999-2000)
Higher Certificate in Insurance (1999 -2003)

University of South Africa

IISA Programme In Advanced Insurance Practice (2006 -2007)
Programme In Financial Management (2008-2009)

University of the Free State

Postgraduate Diploma in Financial Planning, (2010 – 2011)

PROFESSIONAL MEMBERSHIP

Institute : Financial Planning Institute Of Southern Africa
Membership : Certified Financial Planner Professional (2012 – current)

PERSONAL INFORMATION

I am father of three children, two boys one girl. I'm loving being a father to these amazing children. I am passionate about sport. I love reading business books and current affairs. To relax I watch sport and listen to music, enjoying most genres, my favourite being Jazz. Watching movies has been a favourite pastime of mine.

OUR CLIENT VALUE PROPOSITION

In our practice we predominantly work with ambitious professionals, business owners, non-profit organisations and labour unions.

- Our clients value a **balanced family life**, while thriving in their careers.
- Our role is to coach them to ensure they identify and **achieve their financial objectives** throughout their lives.
- Our process focuses on assisting our clients to **look forward to life with expectation** rather than apprehension.

We are a dynamic group of advisers who are excited about the future of our country, Old Mutual, our clients and ourselves.

The steps in our process are:



In the South African context of the financial services industry, I am a Certified Financial Planner®, who works as a Financial Adviser in Old Mutual Personal Financial Advice.

WHAT THIS MEANS?

Old Mutual Personal Financial Advice (PFA) is the tied adviser division within Personal Finance and forms part of Old Mutual South Africa. PFA has more than 2 500 advisers and its adviser force spans the length and breadth of South Africa.



OUR
PARTNERSHIP
WITH OLD MUTUAL
PERSONAL
FINANCIAL ADVICE

ABOUT OLD MUTUAL

Previously, Old Mutual South Africa formed part of Old Mutual Emerging Markets (OMEM), but OMEM listed as Old Mutual Limited (OML) on the Johannesburg Stock Exchange on 26 June 2018 following the Old Mutual plc “managed separation” strategy to separate the Group into four independent business.

OML is a premium African financial services group that offers a broad spectrum of financial solutions to retail and corporate customers across key markets in 14 countries.

Its primary operations are in South Africa and the rest of Africa, and a niche business in China.

OML had 12 million customers and 31 000 employees as at end of 2017 and over 174 years of heritage across sub-Saharan Africa, is a crucial part of the communities they serve and broader society on the continent.

The business is listed on the Johannesburg, London, Zimbabwean, Malawian and Namibian stock exchanges.

Old Mutual is a trusted and recognised leading long-term insurance brand, ranking first in the long-term insurance business-to-consumer category in South Africa for 12 consecutive years according to the Sunday Times Top Brands Awards.

OUR PARTNERSHIP WITH YOU

We provide comprehensive financial planning in the context of a **long-term partnership with you**. Through our experience we have learned that it is important that everyone is clear on what to expect if we are to develop and maintain a successful working relationship – one where I can help you achieve your financial and lifestyle goals.

KEYS TO A SUCCESSFUL RELATIONSHIP: WHAT YOU CAN EXPECT

You can expect that I will consistently and responsibly perform all services related to the provision, review and ongoing monitoring of the financial planning solutions we implement on your behalf.

I WILL ALWAYS:

- Strive to acquire and maintain a thorough understanding of your financial goals
- Stay abreast of the changes and trends in the financial services industry and how this could affect you
- Update your financial information on a regular basis to ensure that it remains current
- Explain the implications of all the financial planning strategies I recommend and happily answer any questions you may have
- Update you as and when appropriate by email, post and phone
- Meet with you regularly to review whether you remain on track to achieving your financial goals
- Resolve queries and questions at point of contact
- Treat you with utmost respect and professionalism

I WOULD APPRECIATE THE FOLLOWING FROM YOU:

- Honestly share your financial aspirations and goals with me
- Keep my office informed of any life changing events, for example, a change in address, banking details, new developments with regard to your family life, etc.
- Treat my team and I with respect

