

CURRICULUM VITAE

Shakthinand Bunwarie

Work Address:

**Suite 48
Private Bag X501
Luxmi
3207**

Contact Details:

Work: 27 33 3971061

Cell: 083 626 5058

Fax: 27 33 3971061

e-mail: shakthi@powerbrokers.co.za

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SHAKTHINAND BUNWARIE

Professional Qualification and Education

CERTIFIED FINANCIAL PLANNER®
PROFESSIONAL OF THE FINANCIAL PLANNING INSTITUTE
Licence Number: 199602219
CERTIFIED ESTATE AGENT (EAAB)
COMMISSIONER OF OATHS

Areas of Expertise

- Basic and Advanced Financial Planning
- Investment Planning
- Income Tax Planning
- Business Development and Assurance
- Retirement Planning
- Estate, Wills and Trusts
- Health Care
- Short Term Insurance
- Property Sales and Services
- Legislations and Regulations

Fully mandated and licensed by the Financial Services Board to market all Financial Services Products from the List of Approved Suppliers to implement the above Professional Services.

Possessing a wealth of financial management, sales and development experience and has a proven ability of successful achievements for the past 28 years.

Accomplished in training, developing and motivating people in all areas of financial planning and management and providing a high level of customer service excellence.

Believes in hands-on approach and achieves high levels of success with both clients and associates.

Professional Development

| | | |
|------------------------------|-----------------------------|------|
| Accounting Diploma | Trial Balance Level | 1983 |
| Certified Estate Agent | Estate Agents Affairs Board | 1988 |
| Certified Financial Planner® | Professional Level (UOFS) | 1996 |
| Commissioner of Oaths | | 2007 |

Completed several courses in Banking, Financial Planning and Management with both Barclays Bank and NBS Bank during periods employed.

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Professional Experience and Significant Achievements

- 1978 to 1982** Barclays Bank
- 1982 to 1986** West City Brokers and Southern Life
- 1987 to 1990** Cheetah Coaches cc. Purchased transport business in family partnership. Achieved excellent returns on investment and created a profitable business.
- 1990 to Date** Madhu Bunwarie Properties and Power Property International
Principal Member and Director
- 1990 to 2002** NBS Bank Ltd.
Employed as a Junior Financial Planner but achieved Executive Status within 9 months. Several achievements and awards during 12 year career with the highlights being:-
Financial Planner of the year on 7 occasions
NBS Gold Award for Most Valuable Employee
Qualified for 12 consecutive Offshore Conventions
Qualified for 20 Local Conventions
Top Production Awards for several Financial Services Companies including:
NBS Bank, Norwich Life, Liberty Life, Sanlam, Momentum Life, BOE Life, Liberty Active, Investec, Charter Life, Metropolitan Odyssey.
- Involved in Staff Development and addressed several Conventions and Training Sessions. Key note speaker at several motivational meetings.
Key person in the Product Development and Brand Marketing for NBS Bank.
- 2002 to Date** Shakthi Bunwarie Financial Services cc trading as Power Brokers & Financial Services. Proprietor of independent financial services company, creating financial independence for all our clients and developing the young leaders of tomorrow through our extensive community development programmes.
- We are contracted to several financial services providers and are continually achieving excellent results in all target areas.
- We are committed and highly motivated in continually elevating our standards and providing our clients with an unsurpassed level of service, advice and products to meet their every requirement.
- Through the Kajal Bunwarie and Power Brokers Education Trust we provide bursaries to young deserving individuals and promote sports and awareness programmes at all Primary and High Schools in the Northern Suburbs of Pietermaritzburg.

