

PERSONAL DETAILS

Rishav Mahabeer

Identity Number: 810905 5186 085

HOME ADDRESS

77 Union Place, Northdale, Pietermaritzburg, 3201, Kwazulu - Natal

WORK ADDRESS

16-19 Royston Road, Suite 20A, Northway Mall, Mountain Rise, Pietermaritzburg

CONTACT DETAILS

Home: 033 391 1224

Work: 033 397 1061

Cell: 083 642 3606

Fax: 086 632 0600

E – Mail: rishav@powerbrokers.co.za



PROFESSIONAL DEVELOPMENT

2004

I have experience as a Financial Planner and Relationship Manager and I am Accredited and competent to represent the Following companies:

Nedbank Corporate

Sanlam Life

Discovery Life/Health

Liberty Life/Health

Liberty Active

Professional Provident Society

Metropolitan Odyssey

Momentum/ Momentum Short Term

Mutual & Federal

2004

Nedbank Corporate

Accreditation for Corporate Banking Consultant/ Relationship Manager

2005

The Insurance Institute of South Africa

Basics of Short Term Assurance

2006

Council for Medical Schemes

Accreditation as Apprentice Health Care Broker

EDUCATIONAL DEVELOPMENT

2004

The Financial Planning Institute

Registered Financial Planner™

Level 1

2005

The Financial Planning Institute

Registered Financial Planner™

Level 2

2007

The Financial Planning Institute

Registered Financial Planner™

Level 3

2009

Prior Learning Centre

Recognition of Prior Learning for Certified Financial Planner®

2010

The University of Free State

Registered for Post Graduate Diploma in Financial Planning

Module 1: Financial Planning Environment

Module 2: Personal Financial Planning

PROFESSIONAL EXPERIENCE

Power Brokers & Financial Services

Financial Planner & Banking Consultant / Relationship Manager

2004 – Current

I am responsible for Advising, developing and servicing existing as well as prospective client portfolios pertaining to Estate Planning, Retirement Planning, Investment Planning and Short Term Insurance. I have the ability to Invest and transact on behalf of Individuals and corporate clients via Nedbank Corporate. I have training as a Financial Manager with the Principal Member Mr. Shakthi Bunwarie CFP® and I am competent to manage a SMME in the following areas:

Cash Flow Management

Compliance- SARS / FAIS / FICA

Management of Accounts

General Employee Management

Northbury Park Secondary

Student Educator

2003 – 2004

I received a bursary from SETA to study via the University of Natal toward a Degree in Education, My Responsibility at school included Instructing Natural Science and Human & Social Science to Grade 8 and 9 learners.

COMMUNITY DEVELOPMENT

I have a keen interest in playing, coaching and the development of Sport ,in specific that of Volleyball, I have had the pleasure of being part of the team at Power Brokers & Financial Services and The Kajal Bunwarie Education and Sports Trust that has been able to develop underprivileged children in the Northern Suburbs of Pietermaritzburg in the key areas of sport and education over the past Five Years.

PROFESSIONAL SKILLS

My work experience and my part time studies demand diverse responsibilities. I have strong administration and interpersonal skills and have the ability to liase and negotiate effectively, organize, execute and supervise activities efficiently. I am able to work on my own initiative and as part of a team.

I am competent in the area of Financial Planning and Bank Administration because I have completed various qualifications and courses that have allowed me to gain and command specific knowledge in these fields to allow me to effectively manage existing and prospective client portfolios as well as analytically commentate and offer valid advice to these clients.

I possess a wealth of sales experience and a proven ability of successful sales and business development, consistently achieving significant year-on-year sales targets and growth. I am accomplished in training and motivation to provide a high level of customer service.

I have proven abilities in defining company direction, achieving targets and developing new and repeat business. I believe that good team leadership and a hands-on approach to management brings increased standards and profits.

REFERENCES

Mr. Shakthinand Bunwarie
Principal Memeber/ Key Individual (Power Brokers & Financial Services)
Certified Financial Planner®
Work : 033 397 1061
Cell : 083 626 5058

Mr. Mahen Naidoo
Broker Consultant
Liberty Life
Work : 033 355 1911
Cell : 083 276 3245

Mr. Guru Mahabeer
First National Bank
Relationship Manager
Cell : 082 786 0399

Mrs. A Mitchell
Nedbank Corporate
Regional Manager
Work : 033 8977205