OLDMUTUAL

DAVID HALL AND ASSOCIATES

Old Mutual Personal Financial Advice

DAVID HALL CFP®

DO GREAT THINGS EVERY DAY

MY BIOGRAPHY

DAVID HALL CFP®
EXECUTIVE FINANCIAL ADVISER (CFP®)

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C 083 656 4143

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Office WhatsApp:	076 508 9073 (Secunda), 066 098 2049 (Pretoria)

PROFESSIONAL EXPERIENCE

I joined Old Mutual Personal Financial Advice in 1995 and have since had the privilege of building a successful career and practice. I am a Certified Financial Planner (CFP)® and a client base that I am proud of. I have dedicated my career and life to becoming one of the top financial advisers in South Africa. I have spent countless hours growing my knowledge, my understanding of my profession, understanding my clients and developing strategies to achieve greatness.

I completed a Post Graduate Diploma in Financial Planning and passed the CFP® board exam in 2006. In 2008 I completed the Advanced Post Graduate diploma. I am a member of Old Mutual's Circle of Distinguished Advisers (CoDA) which recognises the cream of the adviser crop and holds advisers to the highest standard of excellence. Within CoDA I have achieved Top 25 status and won Practice of the Year in both 2009 and 2015.

QUALIFICATIONS

University of Orange Free State
CFP® Certification
2006

University of Orange Free State
Advanced Post Graduate In Financial Planning
2008

PERSONAL INFORMATION

I am married to Erica and have two sons. I am blessed and extremely thankful for the value that each of them adds to my life. Our weekends are filled with family activities, golf days or just a simple walk together enjoying each other's company.

MEET MY TEAM

Our team is made up of independent financial advisers and support staff who work together to ensure that you experience financial planning, advice, and service, that is friendly, reliable, and efficient.

WERNER MULLER

CERTIFIED FINANCIAL PLANNER AND SHORT-TERM SPECIALIST

Werner is a Certified Financial Planner (CFP)® and apart from maintaining his own client base is the short-term insurance specialist for the practice.

T 012 346 9621 E wmuller@oldmutual.com
C 082 735 4297

ANNETJIE VERMAAK

OPERATIONAL MANAGER

Annetjie helps by making appointments and keeping the practice running efficiently. She helps us ensure our clients receive the best possible service and is the go-to person for service or complaints.

T 012 346 9669 E avermaak3@oldmutual.com

HEATHER JANSE VAN VUUREN

CLIENT SUPPORT MANAGER

Heather has almost 10 years of experience managing the administrative processes in the practice. You should call her if you have any questions about your financial planning. She will ensure that the appropriate member of the team responds to your query.

T 017 634 9540 E hjansevanvuuren@oldmutual.com

AMORE JANSE VAN VUUREN

ADMINISTRATION ASSISTANT

Amore's priority is maintaining client files. She prepares the files so that David is aware of each client's needs before David meets with them and handles his instructions after meetings. She is responsible for managing General Client Service questions.

T 017 634 9543 E ajansevanvuuren@oldmutual.com

TAMARYN VAN DER MERWE

ADMINISTRATION ASSISTANT

Tamaryn's priority is maintaining client files. She prepares the files so that David is aware of each client's needs before David meets with them and handles his instructions after meetings. She is responsible for managing General Client Service questions.

T 017 634 9542 E tvandermerwe2@oldmutual.com

OUR CLIENT VALUE PROPOSITION

We believe in helping you get more out of your money, so that you can get more out of your life. My team and I are committed to helping entrepreneurs, business owners and highly skilled professionals to protect that which you value the most... Your family.

We strive towards helping clients create legacies for future generations.

THE STEPS IN OUR PROCESS ARE:

We are passionate about the importance of leading a balanced life while still being serious about success. To this end we coach our clients toward mastery of their financial well-being by using a formula that I have over the years developed called the **TIME PROCESS**

T - My team and I will take the **TIME** to understand your DREAMS and LIFE GOALS

I - We will use the most updated TOOLS and FINANCIAL PRODUCTS to **IMPLEMENT** a personalise, living finanacial plan

M - **MEET** you and your family regularly to REVIEW your plan and ensure your are on track

E - **ENHANCE** your LIFESTYLE by ensuring you realise your GOALS

NOW IS THE TIME... CHOOSE!

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:

- **Provide you with appropriate information** so that you can make the right decisions regarding your financial affairs and will always act in your best interest.
- Help you **develop a structured financial plan** that align with your goals and based on your decisions.
- Fully **inform you of any costs or risks** associated with any solutions or alternatives, which we may propose to you. Make sure I understand your goals.
- **Regularly review your financial plan** to ensure that it remains relevant and appropriate in terms of your goals and objectives.
- **Be a coach** that helps you to make informed decisions.
- **Educate and empower** you to make the right choice.
- **Update your financial information** on a regular basis.
- **Track your progress** and give regular feedback.
- **Meet with you regularly** to review how you track against achieving your financial goals.
- Reply to any emails and telephonic requests as soon as possible/within 24 hours.
- Treat you with utmost **respect and professionalism**

WE WOULD APPRECIATE THE FOLLOWING FROM YOU:

- **Honestly** share your financial aspirations and goals with me.
- **Keep** my office **informed** of any life changing events, i.e. Change in address, banking details, new development with regard to your family life etc.
- Treat me and my team with **respect**.
- **Realistic expectations** in terms of service delivery as well as performance of funds.
- **Work together**

OUR PARTNERSHIP WITH OLD MUTUAL PERSONAL FINANCIAL ADVICE

In the South African context of the financial services industry, our financial advisers are accredited professionals who are part of Old Mutual's Personal Financial Advice team.

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 2500 advisers and its adviser force spans the length and breadth of South Africa.

ABOUT OLD MUTUAL

Our Group was established in Cape Town in 1845 as South Africa's first mutual life insurance company, offering financial security in uncertain times.

Our purpose is to help our customers thrive by enabling them to achieve their lifetime financial goals, while investing their funds in ways that will create a positive future for them, their families, their communities, and broader society. In this way, we significantly **contribute to improving the lives of our customers and their communities** while ensuring a sustainable future for our business.

Old Mutual is a trusted and recognised long-term insurance leader, providing financial solutions to individuals, small and medium-sized businesses, corporates, and institutions. We now employ more than 30 000 people and operate in 14 countries across two regions: namely Africa (South Africa, Namibia, Botswana, Zimbabwe, Kenya, Malawi, Tanzania, Nigeria, Ghana, Uganda, Rwanda, South Sudan and eSwatini) and Asia (China).

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

Old Mutual Life Assurance Company (SA) Limited is a licensed FSP and Life Insurer.

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