

# Gavin McNish

## CERTIFIED FINANCIAL PLANNER®

Managing Director of Kevlar Financial Services



### Summary

I am an independent CERTIFIED FINANCIAL PLANNER®, own my own brokerage and focus on Unit Trust linked investments versus the old fashioned, expensive, penalty/high commission driven life assurance company investments. I have worked in the same profession since 1990, which has added greatly to the depth of knowledge that can be drawn upon when managing client portfolios. I also focus on holistic financial planning incorporating Trusts, Wills and Estate Planning. Our general client experience is a very long-term relationship from working careers to retirement and beyond.

### **CERTIFIED FINANCIAL PLANNER®**

Kevlar Financial Services (Authorized FSP #12805)

Independent Broker for Risk Cover, Local & International Investments, Wills & Estate Planning, Retirement Planning, Deceased Estates, Medical Aid & Employee Benefits

### Kevlar Financial Services

Started in 1999 as an independent brokerage which has grown from strength to strength. We currently have 3 CERTIFIED FINANCIAL PLANNER® professionals working for us and an administration team of 5 people backing us up. We outsource administration intensive Short-Term Insurance thereby ensuring a concentrated focus on our clients Financial, Investment & Retirement planning. We have a well-documented succession plan in place also ensuring continuity of the brand and client experience for hopefully many years to come.

### Education

**University of Orange Free State:** Post Graduate Diploma in Financial Planning - 2005

**University of Port Elizabeth:** Bachelor of Commerce Degree - 1988 – 2001

**Graeme College High School in Grahamstown:** 1981 – 1985

**Clarendon Park Primary School:** 1979 – 1980

**Westering Primary School:** 1973 – 1978

### Volunteer Experience & Causes

**Financial Intermediary Association:** Served on the Algoa branch committee in various roles for 6 years including 2 years as Chairman

**Sardinia Bay Surf Lifesaving Club:** Life Member with over 20 years active duty, 12 years on the committee including Chairman for 2 years and Club Captain for 3 years (1987 – 2009)

### Organizations

**Financial Planning Institute:** CERTIFIED FINANCIAL PLANNER® From February 2005 to date.