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Brief Professional Background Note:

I have 12 years of Investment Management and Investment Consulting experience, within the multi-management industry. During the first 5 years of my career which began in 2006, l played a key role, alongside 4 other dedicated professionals, in establishing a Retail Multi-Manager Division for the Metropolitan Life Group, where together with the CEO of the Investments Division we grew the business from a seed capital of under R100m in 2006, to just over R6bn in 2010. This investment offering was branded – Metropolitan Multi-Managers.

Following the merger of the two entities: Momentum and Metropolitan to form the MMI Group in 2010, I was appointed Chief Investment Officer of the merged Retail Multi-Manager Division. This merged division was then branded - Momentum Investment Consulting, with combined assets of R9bn in 2010. In my new role at MMI, l was entrusted with ownership of the Investment Strategy (*Philosophy and Process)* as well as the management of the House View Portfolios Over the following three years, together with other dedicated professionals, I played a key role in growing this offering by over R10bn to just under R22bn as at 31 December 2013. Momentum Investment Consulting was over this period the Retail Multi-Manager for the MMI Group, and at this stage was the largest player in the Retail Multi-Manager space in South Africa. The year 2013 saw the MMI Group bring together its 3 main multi-manager divisions being: Momentum Manager of Managers (*Institutional Multi-Manager*), Momentum Alternative Investments (*Multi-Manager offering for Hedge Funds and Private Equity)* and Momentum Investment Consulting (*Retail Multi-Manager)*, with combined assets under management of about R150bn. I was appointed the Chief Investment Strategist of this combined unit then branded Momentum Outcomes Based Solutions, with my key responsibility being to shape, drive and influence the combined investment strategy.

About 12 months later, I left the MMI Group in December 2013, to help start a new business – Boutique Investment Partners, focusing on Investment Consulting and Investment Management, as both founding executive director and Chief Investment Officer. This offering currently has about R36bn worth of assets under investment consulting and investment management.

Employment Record:

01/2014 – Present	*Boutique Investment Partners,* ***Founding Executive Director and Chief Investment Officer***
01/2013 – 12/2013	*Momentum Outcomes Based Solutions (Combined multi-manager of the MMI Group),* ***Chief Investment Strategist***
01/2011 – 12/2013	*Momentum Investment Consulting* **Chief Investment Officer / Senior Portfolio Manager**
01/2006 – 12/2010:	*Metropolitan Asset Managers: Multi-Manager Division* **Portfolio Manager & Senior Investment Analyst**
2004:	*Argos Distributors Limited, Central Finance and Business Exchange, Milton Kynes, United Kingdom* **Fixed Assets Management and Reconciliations**
2003:	*Reed Accountancy, Milton Keynes, United Kingdom* **Assistant Accountant**

Key Career Achievements / Asset Management Industry Awards:

1. **2010 – SA Raging Bull Awards**
    - *CPI+3% House View Portfolio*
    - *Best risk adjusted returns over 3-year period to December 2010*

2. **2012 - SA Morningstar Award**
    - *CPI+5% House View Portfolio*
    - *Best risk adjusted returns over 3-year period to December 2012*

3. **2013 - SA Morning Star Awards**
    - *Client nominated as Runner Up – Best Performing Small Asset Manager*

4. **2014 - SA Morning Star Awards**
    - *Client nominated as Runner Up – Best Performing Small Asset Manager*

5. **2014 - SA Raging Bull Awards**
    - *CPI+5% House View Portfolio*
    - *Best risk adjusted returns over 3-year period to December 2014*

6. **2014 – SA Raging Bull Awards**
    - *CPI+3% Client Mandate / Portfolio*
    - *Best risk adjusted returns over 3-year period to December 2014*

7. **2014 – SA Raging Bull Awards**
    - *CPI+5% Client Mandate / Portfolio*
    - *Best risk adjusted returns over 3-year period to December 2014*

Roles & Responsibilities in Current Role:

Investment Strategy:

- Ownership of the Division's Investment Strategy where I play a key role in driving and influencing the following:
    - Asset Allocation Process
    - Investments Strategy Evaluation Process
    - Manager Research Process
    - Chairing the Division's Internal Investment Committee
    - Chairing of our clients' Sub-Investment-Committees

- As a consequence, I am the Portfolio Manager with ultimate responsibility for the division's 7 House View portfolios, which are the best reflection of our investing capabilities:

    - **BCI Best Blend Stable Fund**
      Previously Momentum Best Blend Stable FoF / MET Odyssey Conservative FoF.
      Was PM of both prior funds.

    - **BCI Best Blend Balanced Fund**
      Previously Momentum Best Blend Balanced FoF / MET Odyssey Conservative FoF.
      Was PM of both prior funds.

    - **BCI Best Blend Specialist Equity Fund**
      Previously Momentum Best Blend Specialist Equity Fund.
      Was PM of prior fund.

    - **BCI Best Blend Flexible Income Fund**
      Previously Momentum Best Blend Flexible Income Fund.
      Was PM of prior fund.

    - **BCI Best Blend Global Equity Fund**
      Took over management of the fund in January of 2016.
      This was previously the Verso Multi-Manager International Equity FoF.

    - **BCI Best Blend Global Property Fund**
      Launched in July of 2015

- **BCI Best Blend Worldwide Flexible Fund**

  Launched in December of 2006, as the MET G555 Institutional FoF.

  Was PM since its inception.

I have ultimate responsibility for the performance of the above-named portfolios which represent similar underlying investment strategies, as well as a wide range of our client portfolios

Quantitative Research of Portfolio Managers:

- Setting up a robust, defendable and repeatable Quantitative Framework to aid in the quantitative research of Investment / Portfolio Managers.
- This covers an extensive data base of both local and offshore managers.
- In total, this covers in excess of 5 000 managers across the globe.
- Ensure that the department has access to the best systems, tools and software that will be required in implementing this framework.
- Drive a process that ensures the continuous evolution of this Quantitative Research Framework.

Qualitative Assessment of Fund Managers:

- Setting up a robust, defendable and repeatable Qualitative Framework to aid in the qualitative research of Investment / Portfolio Managers.
- This covers an extensive data base of local and offshore managers.
- Monitor and efficiently capture key trends in the evolution of the South Africa and Global Asset Management landscape.
- Establish sustainable and value adding relationships with the key players in SA's Asset Management industry, and the same globally.
- Drive a process that ensures the continuous evolution of this Qualitative Research Framework

Economic & Market Analysis and Research:

- Setting up a robust, defendable and repeatable Macro-Economic Research Framework that will form a crucial Top Down input into the Division's Investment Process and Philosophy.
- Ensure that the department partners with the best External Research and Internal Research Providers to provide input into this framework.
- Ensure that this frame work has adequate geographical coverage, given that our service offering spans across both local and offshore markets.
- Distill all output from this process into a format that is easily exported into meaningful portfolio positions for Internal House View portfolios as well as our broad Client Book.
- Drive a process that ensures the continuous evolution of this Macro Research Framework

Asset Allocation Committee:

- Have full and complete ownership of the Asset Allocation Process.
- Key focus areas:
  - Strategic Asset Allocation
  - Tactical Asset Allocation
- Play an active role in formulating our Asset Allocation decisions on an on-going basis, which are then implemented across all of our House View Portfolios as well as Client Portfolios.
- Drive a process that ensures the continuous evolution of this Asset Allocation Process.

Portfolio Management & Asset Consulting Responsibilities:

- Portfolio Manager on all of the Division's House View Portfolios as noted above.
- Asset Consulting to a broad range of our Investment Consulting Clients.
- Asset Consulting to most of Boutique Collective Investments' White Label Clients / Partners.

Business Development:

- A material part of my remuneration is linked to two key business development tools:
    - Total net inflows per anum
    - Business profit target per anum
- This is objectively managed through an explicit target for net inflows as well as the division's profitability each year**.**
- Actively involved in marketing presentations of our Business Unit as well as the various funds that we manage on behalf of Independent Financial Advisors within the Broker Community, selected Pension Funds and any other relevant parties.
- Actively involved in Client Pitches in soliciting new business for the department and have secured mandates for our Business Unit.
- Active role in structuring and participating in the Division's external Road Shows and other marketing / brand building events.
- Drive a process that ensures the continuous evolution of this Business Development Process.

Client Relationship Management:

- Setting up a robust, defensible and repeatable framework for Client Relationship Management
- This involves:
    - Pitching for new business / clients
    - Structure for regular client feedback sessions (*Monthly and Quarterly)*
    - On-going active and strategic initiatives to introduce ways of delivering a service offering that will seek at all times to exceed client expectations.
- Drive a process that ensures the continuous evolution of this Client Relationship Management framework.

Chairing Investment Committee:

- Chair Person of:
    - Division's Internal Investment Committee
    - Division's Client Sub-Investment Committees
- Establish an agenda that empowers each member of the Investment Team.
- Establish an agenda that fosters Collaboration and Partnerships between Boutique Investment Partners and its Clients.

Member of the Division's Executive Committee (EXCO):

- Contribute towards the process of identifying key focus areas for the Division at both an Operational Level as well as at a Strategic Level.
- This covers aspects such as:
    - Staff Development and Staff Retention areas.
    - Business growth strategies.
    - Building sustainable and value adding relationships with other departments within the Efficient Group's broader Investment Division.

Training and Mentorship Role to Junior Investment Analysts:

- Establish a robust, defensible and repeatable framework for the Training, Mentorship and Development of the Division's Junior Investment Analysts.

Systems Experience:

- Bloomberg: Global database for Economic and Investments data
- Per Trac Analytical Platform: Asset Allocation and Investments Analysis Program
- MorningStar Research: Particularly useful for International Manager Research
- I-Net Bridge: Economic and Financial Market Data
- Money Mate: Investments Performance Program
- Silica – Investment Administation System
- Hi-Port – Investment Administration System
- Ms. Excel – Including advanced formulas and basic macros
- Visual Basic – Programming

Education:

Professional Qualifications:

2006 –Present: **Near Qualified Actuary**
Specialist Areas: Investments, Investment Banking and Corporate Finance
Institute of Actuaries, Edinburgh, United Kingdom

Actuarial Examinations Record:

Core Technical Stage:

CT1 - Financial Mathematics
CT2 - Finance and Financial Reporting
CT3 – Probability and Mathematical Statistics
CT4 – Stochastic Modeling
CT5 –Contingencies – Stochastic Mathematics
CT6 – Statistical Mathematics
CT7 – Economics
CT8 – Financial Economics
CT9 – Business Awareness Module

Core Applications Stage:

CA1 – Actuarial Risk Management
CA2 – Actuarial Modeling Techniques Course (**Outstanding**)
CA3 – Communications Course (**Outstanding***)*

Specialist Technical Stage:

ST5 – Finance and Investment Specialist Technical B

ST6 – Finance and Investment Specialist Technical A: (*Certificate in Derivatives)*

Specialist Applications Stage (Fellowship / Qualifying Exam):

SA5 – Investments Specialist – Investment Banking & Corporate Finance

2012: ***Gordon's Institute of Business Studies, South Africa***
Executive Leadership Development – Managing for Results

Professional Membership:

Member – Institute of Actuaries, Edinburgh, United Kingdom

Member – Actuarial Society of South Africa

Tertiary Education:

2002 – 2005:	*University of Cape Town, Bachelor of Business Science* **Actuarial Science Honors**
1999 – 2000:	*Marist Brothers College* **Advanced Level Certificate – University of Cambridge Local Examinations Syndicate** (GCSE)
1995 – 1998	*Marist Brothers College* **Ordinary Level Certificate – University of Cambridge Local Examinations Syndicate** (GCSE)

Awards and Achievements:

2002:	*University of Cape Town* **Dean's Merit List of Academic Achievement**
2000:	*Marist Brothers College,* **Financial Accounting Student of the Year**
1998:	*Marist Brothers College,* **Public Speaking Award**

Expected Career Growth Plan:

Pursuing professional qualifications:

- Have been actively pursuing my Professional Actuarial Board Exams with the Institute of Actuaries in the United Kingdom where l am specializing in **Investments, Investment Banking and Corporate Finance**.
- Passed Actuarial Fellowship Exam in 2011.
- My target qualification date is currently December 2018 – have two communications exams outstanding. Had to postpone this, as the setting up of the current business was a lot more time and energy demanding than l anticipated, at the outset.
- Intend to pursue an MBA Qualification from 2019/2020.
- Will remain actively involved in short Executive Leadership Development Courses offered by local business schools such as the Gordon's Institute of Business Studies.

Project Finance & Management:

- Strong passion to play a lead role in raising finance and managing key Infrastructural Development Projects across Africa, which l believe will be a key theme in Africa over the medium to long term.
- MBA Programme will likely be focused on this.

Interests / Hobbies:

- Strong focus on my **Spiritual Growth**
- Swimming
- Gym
- Tennis
- Cycling
- Athletics
- Reading
- Music

References:

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