**CURRICULUM VITAE**

**FREDERICK VAN HEERDEN**

|  |
| --- |
| **PERSONAL DETAILS** |

NATIONALITY : SOUTH AFRICAN

ETHNICITY : WHITE

HOME LANGUAGE : ENGLISH

OTHER LANGUAGES : AFRIKAANS

DATE OF BIRTH : 26 DECEMBER 1985

MARITAL STATUS : SINGLE

GENDER : MALE

|  |
| --- |
| **SECONDARY QUALIFICATION** |

SCHOOL ATTENDED : YORK HIGH SCHOOL

GRADE PASSED : GRADE 12

YEAR : 2004

SUBJECTS : ENGLISH; AFRIKAANS; MATHS; ACCOUNTING; COMPUTER

 STUDIES; BIOLOGY

|  |
| --- |
| **TERTIARY QUALIFICATIONS** |

* ADVANCED DIPLOMA IN MANAGEMENT: FINANCIAL PLANNING (NQF LEVEL 7)

2015 - UNIVERSITY OF THE WESTERN CAPE

* NATIONAL WEALTH MANAGEMENT CERTIFICATE 57608: NQF LEVEL 5 WITH DISTINCTION 2013 - SOUTH CAPE COLLEGE
* RE1: NATIONAL REGULATORY EXAMINATION FOR REPRESENTATIVES 2013 - MOONSTONE
* INTERNATIONAL COMPUTER DRIVING LICENSE (ICDL DIPLOMA) 2005 - SOUTH CAPE COLLEGE

|  |
| --- |
| **COMPUTER LITERACY** |

 MICROSOFT PROFICIENT ICDL

|  |
| --- |
| **CAREER DETAILS** |

**1. COMPANY :**

**POSITION : RECRUITMENT OFFICER**

**PERIOD : JAN 2015 TO DATE (AGREEMENT MADE WITH EMPLOYER:**

 **IMMEDIATE NOTICE MAY BE GIVEN WHEN POSITION IN**

 **FINANCIAL SERVICES BECOMES AVAILABLE)**

* **Marketing**
* **Handling** of client CV’s
* **Maintaining** administrative systems
* **Arranging** interviews with clients

**2. COMPANY : FVH BROKERS CC**

**POSITION : FINANCIAL ADVISER / WEALTH MANAGER / PARAPLANNER**

**PERIOD : 2 YEARS - NOVEMBER 2012 TO NOVEMBER 2014**

* Investments
* Retirement planning
* Risk Insurance
* Short term Insurance
* Conduct Financial Needs Analyses, Quotes, Proposals, Amendments & Implementation
* Service clients / liaise with product suppliers / broker consultants daily, ensuring only the highest standard of client service
* Written reports to clients annually/bi-annually
* Active sales & marketing initiatives
* Assist senior financial advisors with all types of administrative duties (research, reports, analysis etc.)
* Active attendance to quarterly presentations of Fund Management companies (Coronation, Allan Gray, Marriott, Prudential etc.) and insurance companies to maintain product knowledge
* Structuring client investment portfolios – CIS via Wealth Platform as well as insurance portfolios
* Conduct research and analyses of Unit Trust underlying assets to ensure client portfolios are structured in line with economic environment and client risk profile etc.

**3. COMPANY : CODA MUSIC**

**POSITION : SALES EXECUTIVE**

**PERIOD : 18 MONTHS - JAN 2011 TO JUNE 2012**

* Handling all office related administration
* Quotes
* Invoicing
* Sourcing new clients

**4. COMPANY : AAB TOOLS – DUBAI UAE**

Position : Business Development Executive

Period : Jan 2010 – Dec 2010

**5. COMPANY : DUBAI INTERNATIONAL ACADEMY – UAE**

Position : Music Teacher (Drumming Theory Grade 1 - 8)

Period : Nov 2008 – Nov 2009

**6. COMPANY : CONSOLIDATED STARCH INDUSTRIES**

Position : Assistant General Manager

Period : Nov 2007 – Oct 2008

**7. COMPANY : PAUL BOTHNERS MUSIC**

Position : Drumming Instructor

Period : Jan 2005 – Sep 2007

**Job Seeker First Name / CV No: 1800834**

[Click to send CV No & get contact details of candidate](http://www.gulfjobseeker.com/feedback/submit_fb_em.php)

 