

GERBER & LOUW (Pty) Ltd

FINANCIAL SERVICE PROVIDER

FSB License: 2423

DISCLOSURE BY INTERMEDIARY TO CLIENT

(In terms of FSB regulations – FAIS)

FINANCIAL and INVESTMENT ADVISOR: **JC LOUW (CFP®)**

Senior Financial and Investment Adviser / CFP® with: **GERBER & LOUW (Pty) Ltd**

CONTACT DETAILS:

CELL: 082 881 2892

FAX: 086 6195 809

E-mail: kobuslouw@gerberlouw.co.za

I hereby confirm that I did not receive more than 30% of my total commission/fees and remuneration from any specific product provider AND held no financial interest (shares, membership, incentives, etc) in any financial institution / product provider that I am contracted to place business with, in the preceding year.

GERBER & LOUW has Indemnity and Fidelity Insurance with underwriters STALKER HUTCHISON ADMIRAL (PTY) LTD – Insurers : SANTAM LTD – Policy nr 02028 – Brokers: CARL GREAVES BROKERS (PTY) LTD -

I am accredited on the products/service categories listed on behalf of financial/assurance and/or investment companies contracted by: **GERBER & LOUW (Pty)Ltd**

Investments: PORTFOLIOS (NON TERM) LINKED INVESTMENTS in terms of the Act on Collective Investments; Local and Offshore Funds managed by FSB registered Financial Service providers

Investments: Term

Risk: Life, Disability, Physical impairment, Trauma, Accident

DETAILS OF RELEVANT EXPERIENCE:

17 Years - SANLAM (Management and Financial and Investment Advisor)

3 Years- ABSA (Investment Advisor)

8 Years- GERBER & LOUW (Management / Portfolio Advisor / FSB Compliance)

DETAILS OF INDUSTRY RELATED TRAINING AND QUALIFICATIONS:

B. Iuris (UNISA)

CFP (Certified Financial Planner- ILPA) of the FPI (Financial Planning Institute)

EDP (Executive Development Program) Manchester Business School

ABSA Investment Academy: 3

Company profile / 2

E-mail : financial@gerberlouw.co.za

Fax; 086 6195 809

PO Box 824 : KLEINMOND; 7195

REGISTERED HEAD OFFICE : 3870 Chironia Cl
Betties Bay

Director: JC Louw

GERBER & LOUW (PTY) LTD 2001/026033/07

GERBER & LOUW (Pty) Ltd

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COMPANY PROFILE:

GERBER & LOUW (Pty) Ltd Reg no. 2001/026033/07

INDEPENDENT FINANCIAL/INVESTMENT ADVICE AND SERVICE PROVIDER

Established: 2001

Directors: J C Louw CFP® (Financial Planning Institute: Licence nr.9601732)

Compliance Officer: J C Louw (Cell: 082 881 2892)

Western Cape office address: 3870 Chironia Cl
BETTIES BAY

Postal address: PO Box 824
KLEINMOND
7195

FAX: (086 6195 809) E-mail: financial@gerberlouw.co.za

CONTRACTED FINANCIAL SERVICE PROVIDERS:

STANLIB; SANLAM / SANLAM PERSONAL PORTFOLIOS; MOMENTUM / MOMENTUM WEALTH; METROPOLITAN; ODDESEY; GINSGLOBAL; AIMS (ABSA Investment Man. Services); INVESTEC; FAIRBAIRN CAPITAL / OLD MUTUAL and NEDGROUP

Any enquiries and/or complaints can be addressed to The Compliance Officer.

REFERENCES / CONTROLLING BODIES:

Financial Services Board (FSB) :

TEL: 080 0110443 / 080 0202087: Web site: www.fsb.co.za (REF: 2423)

Financial Planning Institute (FPI):

011 4751149: Web site: www.fpi.co.za (Ref: Licence: 9601732)

Signed:

J C LOUW (CFP)

CLIENT:

Date: _____

E-mail : financial@gerberlouw.co.za
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