



UCTRF

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# Learn, Grow, Flourish

Member Education Workshops



Speakers and Programme

9 & 16 JULY 2024



**UNIVERSITY OF CAPE TOWN**

IYUNIVESITHI YASEKAPA • UNIVERSITEIT VAN KAAPSTAD





**Waseem Mukkudem, CFP®**

*GMI – Financial Advisors*

Waseem holds a BCom in Economics and Finance (UWC) and a Postgraduate Diploma in Financial Planning (Stellenbosch). He is a Certified Financial Planner® professional and is a member of the Financial Planning Institute of Southern Africa (FPI). He has been in the industry since 2016 and has gained experience in investment and retirement planning, risk planning, and short-term insurance (personal and commercial). He specialises in Holistic Financial Planning.



**Wynand Gouws, CFP®**

*GMI – Financial Advisors*

Wynand holds a BTech Marketing (Wits), Postgraduate Diploma in Financial Planning specialising in Investment Management and Estate Planning (UFS), MBA (Stellenbosch) and a Postgraduate Diploma in Future Studies (Stellenbosch). He is a Certified Financial Planner® professional and is a member of the Financial Planning Institute of Southern Africa (FPI). He has been in the industry since 1998 and has gained investment and wealth management experience at an operational, sales and executive level with blue-chip financial services companies.



**Monica May**

*GMI – Financial Advisors*

Monica holds a BCom in Financial Accounting (NWU), Postgraduate Certificate in Education (NWU) and a Postgraduate Diploma in Financial Planning (UFS). Monica joined Gradidge-Mahura Investments as an intern through the FPI Mentorship Programme in March 2022.



**Somila Putuma**

*Benefit Consultant – Simeka Consultants and Actuaries*

Since joining Simeka in March 2019, Somila has gained valuable experience from working on large stand-alone funds. She has 6 years' relevant knowledge in the retirement fund industry. She started her career as an Associate Consultant at Old Mutual Corporate in 2016, where she mainly focused on umbrella funds. In 2015, Somila completed a Bachelor of Commerce Law degree at the Nelson Mandela University (NMU). She has also completed a Postgraduate Diploma in Financial Planning, through the Stellenbosch Business School.



*Please view the programme for the workshops on the next page.*



The **4** workshops held on **9 July** will be repeated at the same times on **16 July**. Members may attend any of the **4** sessions on either date.

In addition, **Alexforbes** will be available to assist members with registration on AF Connect. Members who are considering accessing a portion of their benefit from 1 September 2024 in terms of the Two Pot System should register on AF Connect in order to make a withdrawal once the legislation becomes effective.



**THERE WILL  
BE PRIZES  
UP FOR  
GRABS!**



# UCTRF

## Member Education Workshops

9 and 16 July 2024

### Programme

09:00 – 09:30	REGISTRATION	
09:30 – 10:30	Basic Understanding of the UCTRF and Associated Benefits	Penny Fabre – UCTRF Principal Officer
10:30 – 11:00	REGISTRATION	
11:00 – 12:00	Two Pot System	GMI – Financial Advisors
12:00 – 12:30	REGISTRATION	
12:30 – 13:30	Retirement Projections Workshop – how to ensure that you have enough to retire	Somila Putuma - Employee Benefits Consultant - Simeka
13:30 – 14:00	REGISTRATION	
14:00 – 15:00	Understanding your Options on Retirement	GMI – Financial Advisors
9:00 – 15:00	Alexforbes will be available to assist members with registration on AF Connect.	

## Fund Contact Details

UCTRF Offices Tel: 021 650 2934

Please submit all comments or questions via [this form](#)

Fund website: [www.uctrf.co.za](http://www.uctrf.co.za)



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