momentum investments

speaker profiles

momentum wealth roadshow

Mickey Gambale

Head: Product Development, Momentum Wealth

Mickey joined Momentum Wealth in 2006 as part of the Wealth Product Development Team. His role has expanded over the years and he is now Head of Wealth Product Development and sits on the Momentum Wealth Executive Committee. His portfolio covers both local and international platform development, as well as the propriety product development such as structured products, guaranteed and structured funds, and traditional annuities. Prior to joining Momentum, Mickey was Head of Development Finance for African Alliance in their Swaziland and Ugandan operations. Mickey is a member of the Financial Planning Institute of Southern Africa and holds a Bachelor of Business Administration, post-graduate in financial planning and a Masters of Business Administration.

Andries Kotzee

Investment Manager, Momentum Manager of Managers

Andries joined the Momentum Group as an actuarial assistant in 1999, and spent most of the next nine years in various product development and management roles, primarily within Momentum's investment business. He joined Momentum Global Investment Management Limited in 2008, having transferred from the investment product development team of Momentum Wealth. In London Andries was responsible for asset class and manager research, as well as the implementation of Momentum Global Investment Management Limited's investment strategy across a range of global portfolios – both for Momentum and third party clients. He also formed part of the company's asset allocation committee. In 2011 he relocated to South Africa where he now represents both Momentum Global Investment Management and Momentum Manager of Managers in the retail investment market. Andries became a CFA charter holder in 2007.

David Shapiro

Deputy Chairman, Sasfin Securities

David joined the stock market in 1972, shortly after qualifying as a Chartered Accountant. On top of his executive duties, he manages private client money and runs two small unit trusts – The Sasfin Value Fund and The Sasfin Equity Fund. David is a well-known investment expert and radio personality and comments daily on the stock market on East Coast Radio, Radio 702 and Alec Hogg's SAFM Market Update. He also appears weekly on Summit and CNBC and writes a regular business column for The Times, a daily newspaper. He has been a stockbroker and investment expert for over 33 years.

Jeffrey Wiseman

Head: Fiduciary Services, Momentum Wealth

Jeffrey is Head of Fiduciary Services at Momentum Wealth. After completing articles at Pagdens in Port Elizabeth and being admitted as an attorney and notary public, Jeffrey remained in legal practice for a short while before joining Liberty Life in 1996. In 1999, he moved to Momentum where, in addition to his current role, he has held various legal advisory, financial planning and compliance positions. Along with various qualifications in tax and financial planning, Jeffrey holds an LLB from the University of Cape Town and an LLM from the University of Pretoria. He is a CFP professional and a full member of the UK-based Society of Trust and Estate Practitioners. Momentum Fiduciary Services is a new initiative in Momentum Wealth that offers wills, estate administration, trusts and specialised local and offshore estate planning solutions to high-net-worth and affluent clients. One of its main objectives is to align with financial advisers in providing comprehensive, transparent and easily accessible trust and fiduciary solutions.

Speakers are subject to change without prior notification.