

# CURRICULUM VITAE

Jacques Munnik

## PERSONAL DETAILS

<b>Address</b>	34 Vleiland Crescent Brackenfell Western Cape South Africa 7560	<b>Date of Birth</b>	16 November 1973
		<b>Nationality</b>	Dual nationality: UK/RSA
		<b>Married</b>	Since April 2017
<b>Telephone</b>	+27 (0)76 310 5613		
<b>E-mail</b>	jacques.munnik@gmail.com		

## CAREER HISTORY

### May 2015 to current – Career Break / Freelance investment writing work

I undertook an extended break to pursue a personal goal – a passion for ministry. During this period, I attained a degree in theology and participated in global mission outreach. I worked in pastoral and counselling roles at several Cape Town and Gauteng churches.

I did not, however, cut myself off from financial services, and to that effect, I continued to do remote freelance investment writing work for Sanlam Global Investment Solutions (recently acquired by Kane Solutions) and Sanlam Investments UK, respectively.

### December 2011 to May 2015 – Glacier International (Sanlam)

*Regional Manager - Offshore Specialist*

I was part of a team of four offshore specialists nationally. The role included:

- Specialist offshore investment advice to financial advisors, wealth managers, and bank brokers.
- Business development of Sanlam Glacier's offshore investment offering.
- Distribution of the offshore life platform across six provinces, including Gauteng North, Mpumalanga, Northwest, Northern Cape, Free State, and Limpopo.

## **April 2007 to November 2011 – Castlestone Management LLC**

*Director – Africa*

I represented Castlestone Management LLC (a New York-headquartered independent financial advisory firm) across South and Sub-Saharan Africa. The role included:

- Business development of a broad range of traditional and hybrid alternative investments to financial intermediaries, institutions, private banks, life companies, and global clients.
- Commodity funds formed a large part of the offering, which broadened my experience across the asset class matrix.

## **April 2006 to April 2007 – Self-employed**

*Consulting (full-time)*

- Consulted with Old Mutual Asset Solutions (UK) on specific Investment Marketing projects.
- Drove strategic business development into the South African advisory base.
- I was responsible for several key roles within Investment Marketing management remit.

## **February 2005 to April 2006 – Old Mutual Asset Solutions (UK)**

*Investment Marketing Manager*

I managed the international marketing support function, including:

- Business development support in the wholesale retail space.
- Investment marketing support to distribution partners in two principal regions - South Africa, the Rest of Africa, and the Channel Islands.
- Directed marketing strategy research, including campaigns, and managed all aspects of the overall marketing material output and content within the investment marketing team.

## **July 2001 to end January 2005 – Old Mutual Asset Solutions (UK)**

*Investment Marketing Executive*

I communicated to the retail market through investment writing, performance reporting, and presentation production. The remit included:

- Fund appraisal/analysis and research.
- Interviews with in-house and third-party fund managers.
- Communicating investment strategies, product developments, and performance notes.
- Market Reporting.

## **01 September 2000 to end June 2001 – State Street Global Advisors (London)**

*Client Service Reporting*

- Management of the day-to-day analytical and reporting requirements of the Client Service Department.
- Responsibility for content and timely client reporting delivery.
- Preparation of all analytics, including style analysis on client portfolios.

## **April 2000 to September 2000**

Sabbatical/Travelling

## **1995 to April 2000 - Old Mutual**

*Senior Broker Consultant & Branch Managing Consultant*

- Managed a broker portfolio (financial advisors) comprising corporate and independent financial advisors.
- Marketing and distribution of the life insurance and investment product range.

## **1993 and 1994 - Fedsure Life**

- Client Service & Consulting with Brokers (FA's) (Temp)

## **1992 – National service**

South African Air Force

## **EDUCATIONAL QUALIFICATIONS**

*B Th. (Bachelor of Theology) – Auckland Park Theology Seminary (2018)*

*N. Dip Marketing Management – Tshwane University of Technology (1996)*

### **School Attended:**

Nelspruit High School – South Africa

Matriculation (A Level Equivalent)

## **IT SKILLS SUMMARY**

Microsoft Office (MS Word, Excel, and PowerPoint), Microsoft Windows, MS Outlook, Internet, Bloomberg, and Micropal Workstation.

## **COURSES COMPLETED**

Financial Markets & The City

Microsoft Windows

Advanced Excel

Internet Training

Marketing Skills

Legal-Technical Aspects of Insurance

Financial Planning

Investment Planning

Foreign Exchange & Investing Abroad

Tax

Estate Planning

Social Styles

Management Skills

BPP Professional Education (London)

Internet Solutions (London)

Aris Education (London)

Internet Solutions (London)

The Marketing Workshop (SA)

Old Mutual SA

Old Mutual SA

Old Mutual SA

Old Mutual SA

Old Mutual SA

Old Mutual SA

Old Mutual SA

Old Mutual SA

## **PROFILE**

I am a driven, diligent collaborator and initiative-taker with a wealth of experience in business. I have an innate drive for success and exceeding goals. I am a people person, a team player, and a self-starter.

## **ESSENTIAL SKILLS**

- Business Development.
- The complete written & verbal communication mix.
- The total strategic marketing mix.
- Offshore Distribution.