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UCTRF Planning for Retirement Seminar

10 July 2019



UNIVERSITY OF CAPE TOWN
IYUNIVESITHI YASEKAPA • UNIVERSITEIT VAN KAAPSTAD



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About the Presenters



William Dlanga Nkutha

Deputy Principal Officer, UCTRF

William Dlanga Nkutha is the University of Cape Town Retirement Fund's Deputy Principal Officer. William has more than 10 years' experience in Employee Benefits. He started as a fund administrator and later became a fund consultant for one of the leading employee benefits companies in South Africa. He holds a Wealth Management Qualification (140 FAIS Credits) and a Postgraduate Diploma in Management (Retirement Funds) and has recently written the National Certificate for Professional Principal Executive Officer (PPEO).

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Penny Fabre

Principal Officer, UCTRF

Penny Fabre was appointed as the Fund's Principal Officer in December 2015. She has been in the Employee Benefits industry for over 30 years in various governance roles and worked as a Principal Officer for several large umbrella funds in the 7 years prior to joining UCTRF. She has a BA from the University of Cape Town, an LLB from UNISA, and is a Certified Principal Executive Officer.

Phone: 021 650 2159

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Joanna Legutko

Trustee, UCTRF

Joanna is a qualified actuary with 15 years of experience in the pension field. She has worked as a Valuator and Actuary with Jacques Malan Consultants and Actuaries as well as at Jardine Lloyd Thompson in London before she joined the UCT Actuarial Science Section as a lecturer in 2012. Joanna heads up the Actuarial Science Section and teaches Actuarial Risk Management and Pensions subjects. Her research interests include happiness and how it is possible to achieve a happy retirement.



Tracy Johnson

Trustee, UCTRF

Tracy Johnson is a lecturer in the Department of Finance and Tax, Commerce Faculty, UCT. She convenes the BCom Tax Honours programme and is a Member Trustee of the UCTRF. She previously worked for PwC for a number of years in their Corporate Tax Department.



Catherine Srubisky

ICAS Clinical Psychologist

Catherine's training and current approach in development and implementation is constantly guided by the client-centered tenet. Interventions are only effective and appropriate when they speak directly to the needs of the client, which should only support product and service delivery. This is within her role as facilitator for ICAS as well as SACAP. Both positions require an acute sense of accessing, connecting and building rapport with others. This develops and builds trust, which in turn enhances the participants'/students' capacity to engage in the training process. Furthermore, both roles require the ability to engage with people at all levels of employment, financial status and experience. This has ranged from labourers to high-level managers, and requires the capacity to speak to client's (stakeholders') expectations and negotiate spaces between people.



Sylvester Appasamy

Principal Executive: Healthcare, PSG Wealth

Sylvester is the Principal Executive: Healthcare at PSG and has 17 years' experience in various industries including healthcare, finance and insurance, both nationally and internationally. Sylvester's role in the healthcare industry has been focused on medical scheme administration in various positions and large corporate organisations in South Africa. He is primarily focused on scheme rules and policy, competitor activities, budgets, recruitment of members and the risk profiles thereof, and advising of corporate organisations. Sylvester's vast experience with broker management, corporate organisations and the administration of medical schemes is an integral part of the healthcare practice within PSG, which prides itself on personal attention to each and every one of its principal members. Sylvester is also a director of PSG and is a member of various PSG committees.



Muneeb Allen

Principal Consultant, Simeka Consultants & Actuaries

Muneeb Allen is currently a Principal Consultant at Simeka Consultants & Actuaries. He holds a Bachelor of Commerce degree and various employee benefit industry related certificates. He has 18 years' experience in the financial services industry having specialised in consulting to large standalone retirement funds. He has recently taken over the Principal Consultant role to the UCTRF Board of Trustees.



Melanie Louw

Senior Manager of Legal Services, Sanlam

Melanie Louw is currently a Senior Manager of Legal Services at Sanlam. She graduated with a Bachelor's degree in law and furthered her knowledge in Property, Tax and Commercial Law throughout the years. She has since also acquired Advanced Diplomas in Financial Planning, specialising in subjects such as Personal Risk Management, Fund Governance and Maintenance, and Fund Design and Finance. Melanie has had extensive experience as a Legal Advisor in various companies.



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UCTRF Retirement Seminar

Thursday 10 July 2019

Programme

8.00	<i>Registration</i>	
8.40	<i>Introduction of Speakers</i>	William Nkutha <i>Deputy Principal Officer</i>
8.50	<i>Welcome</i>	Penny Fabre <i>Principal Officer</i>
9.00	<i>UCT Provisions for Retirement UCTRF</i>	Joanna Legutko <i>UCTRF Trustee</i>
10.00	<i>Tax Planning UCTRF</i>	Tracy Johnson <i>UCTRF Trustee</i>
11.00	Tea	
11.30	<i>ICAS – Financial Wellness</i>	Catherine Srubisky <i>ICAS Clinical Psychologist</i>
12.30	<i>UCT Provisions for Retirement – Discovery Health</i>	Sylvester Appasamy <i>Principal Executive: Healthcare - PSG Konsult</i>
13.00	Lunch	
14.00	<i>How your Will, Intestate Succession, and Nomination of Beneficiary Form intersect</i>	Muneeb Allen <i>Principal Consultant: Simeka Consultants & Actuaries</i>
14.45	<i>Wills and Estate Planning</i>	Melanie Louw <i>Senior Manager Legal Services: Sanlam</i>
15.45	Evaluation Forms	
15.50	Lucky Draw and Closure at 16.00	

Fund Contact Details

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Please send all comments or questions to
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Fund website: www.uctrf.co.za



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