



BRADLEY MITCHELL
Co-Founder: AMA Insure

“The best time to plant a tree was 20 years ago. The second-best time is now.”

- Chinese proverb

PROFESSIONAL ACHIEVEMENTS

- | Bachelor of Commerce
- | Advanced Certificate in Financial Planning
- | Certificate in Financial Planning

PERSONAL ACHIEVEMENTS

- | Purchasing and developing my own brokerage in 2019
- | Incentive trip to Sweden
- | Voted Employee of the year in 2014
- | Completing the Otter Trail Run
- | Cycling five Giants Castle Mountain Bike Races
- | Qualified Professional Hunter
- | Active role in TNT (Trojans Neurological Trust)

Bradley Mitchell is a seasoned professional in the financial services industry with a passion and focus on short-term and long-term insurance. He thrives on working with clients and providing them with valuable solutions. Bradley values providing customised insurance solutions to both individuals and organizations to ensure comprehensive cover.

AREAS OF SPECIALIST FOCUS

- | Short-term Insurance
- | Long-term Insurance
- | Estate Planning
- | Will Drafting
- | Employee Benefits

PRIVATE WEALTH MANAGEMENT

- | Retirement Modelling & Planning
- | Estate Planning & Fiduciary Review
- | Quantitative Portfolio & Fund Analytics
- | International Tertiary Education Planning
- | Direct International Property Investments
- | UK & US Pension Planning & Transfers
- | Portfolio Gearing & Sophisticated Investments
- | Mutual Funds & Exchange Traded Funds
- | Direct Share Investments
- | Investment Bank Products
- | Employee Benefit Schemes
- | Business Assurance
- | Health Care