



KYLE DRAKE

Consultant

“Creativity is intelligence having fun”

- Albert Einstein

PROFESSIONAL ACHIEVEMENTS

- | BCom Intrapreneurial Management
- | Promoted to Senior Business Development Consultant within 12 months of joining AMA Africa

PERSONAL ACHIEVEMENTS

- | Level 1 Coaching Certification from Cricket South Africa(CSA)
- | Community outreach & upliftment, coaching underprivileged children with CSA
- | Took part in a 1400km, unsupported mountain bike ride from Johannesburg to Cape Town to raise awareness for the Erdheim-Chester disease.

Born and raised in Johannesburg, Kyle Drake has always had a strong interest in global economics, international trade, and investment markets. This early curiosity shaped both his academic path and his professional career, laying the foundation for his transition into financial services. Kyle began his career at KLA, a market research and data specialist firm, where he gained valuable exposure to data-driven decision-making and consumer insights. During his time at KLA, he worked on product testing and new product launches for major South African corporates, including SA Breweries and ABSA. While completing his bachelor's degree, Kyle played a key role in managing the ABSA Group account, developing a solid understanding of client servicing, stakeholder management, and commercial strategy.

With a long-term ambition to build a career in finance and wealth management, Kyle was head-hunted by AMA Africa in 2017 and joined the business as a Business Development Consultant. From the outset, he distinguished himself through his work ethic, resilience, and ability to build strong, trusted relationships with clients. Within 12 months, Kyle was promoted to Senior Business Development Consultant, reflecting both his performance and leadership potential. In his senior role, Kyle worked closely with the Business Development Manager and played an active role in mentoring and training new consultants. Under the guidance of Founding Senior Partner Greg Morris and Senior Partner Nick Pitro, Kyle completed his consulting training and transitioned into managing his own personal client book.

Today, Kyle is a fully qualified financial advisor and consultant, with over five years' experience advising clients across investment planning, wealth structuring, and long-term financial strategy. He is known for his disciplined, client-centric approach, clear communication style, and commitment to helping clients make confident, informed financial decisions. Kyle prides himself on building long-term partnerships with his clients, focusing not only on performance, but on clarity, trust, and consistency throughout every stage of their financial journey.

AREAS OF SPECIALIST FOCUS

- | Strong focus on Client Servicing
- | Global Portfolio Management
- | Retirement Planning
- | Education Savings
- | Portfolio Management Transfers
- | International Property Investing
- | Life Insurance

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

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REFERENCES AND TESTIMONIALS

"It's been a real pleasure to have Kyle manage my investments over the last few years. He took over a tired and stalling portfolio and revamped it to provide positive returns in quick time with no fuss. I wouldn't hesitate to recommend Kyle to anyone looking for fund management and investment advice."

Robert Goble, Managing Director Tandem Global Logistics

"I highly recommend Kyle Drake as a financial advisor. His strategic approach to wealth management has been instrumental in helping me build a robust portfolio for retirement. Kyle possesses a deep understanding of the markets and has a remarkable talent for crafting a disciplined, long-term plan. He stays calm and focused during periods of market volatility, which provides much-needed peace of mind. Any prospective client would be in excellent hands with Kyle."

Wen Zhang, Director Phillips Shanghai

"When Kyle was assigned to me as a financial consultant, I was looking for someone who could help me make sense of my investment plans. I had always found financial planning slightly overwhelming - too many numbers, a lot of jargon, and often little clarity. From our first meeting, he made everything feel approachable. He listened carefully, asked thoughtful questions about my goals and overall rationale, and explained things in a way that made sense to me. Something I appreciate most about Kyle is his trustworthiness. Talking about money can be uncomfortable, but with him, I've always felt completely at ease. He's an attentive listener and never pushes anything that doesn't fit my needs. Every recommendation comes with a clear explanation, and he takes the time to ensure I truly understand the reasoning behind it. Thanks to him, I've gone from feeling intimidated by financial decisions to feeling confident and informed. He's turned what used to be a source of stress into something I can actually enjoy learning about."

Responsiveness is another area where he really stands out. Whenever I have a question - big or small - he's always quick to reply, and his calm, reassuring tone instantly puts me at ease.

Especially during uncertain times in the markets, his steady guidance and availability have been invaluable. I always feel like I can count on him. What makes Kyle truly special, though, is his human touch. He remembers the details of my personal circumstances and follows up thoughtfully. Thanks to his advice, I feel more in control of my finances than ever before. I would wholeheartedly recommend Kyle to anyone looking for a financial consultant who combines deep expertise with kindness, clarity, and integrity."

Fabrizio Massini, Director at Ibsen International Austria

"I have worked with Kyle across three separate investments locally and offshore. Throughout our relationship, I have been consistently impressed by the level of service, clarity of advice, and proactive management he provides. Kyle takes an active approach to managing my portfolio and communicates clearly around strategy, market conditions, and any recommended changes. This has given me confidence that my investments are being monitored and adjusted with my long-term objectives firmly in mind."

The impact of this hands on management is evident in the performance of all of my portfolios, as well as in the peace of mind I have gained. I value Kyle's professionalism, responsiveness, commitment, and would confidently recommend his services to anyone seeking disciplined, well-managed investment advice."

Ansgar Pabst, Business Owner

"Since my first contact with Kyle I have been impressed with his in depth knowledge of the global markets and his ability to steer my portfolio in a way that has achieved incredible results without adverse risks. He understands my requirements and goes beyond what is reasonable to ensure that my expectations are met. I would not hesitate to recommend him as a financial adviser!"

Luke Anderson, Operation Director Whitecode SA

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"I've greatly appreciated Kyle's guidance and professionalism in managing my SIPP. He has a calm and patient approach, always taking time to explain complex investment matters in a way that's easy to understand. Over the years, Kyle has consistently demonstrated sound financial insight and a genuine interest in helping me build long-term stability and growth for my retirement portfolio. I value his proactive communication, transparency, and the trust that has developed through his ongoing support. It's reassuring to know my investments are being managed with such care and integrity."

Morné Combrinck, Commercial Property Broker Investor Property

"Working with Kyle as my personal investment advisor has been an exceptional experience. From the very beginning, Kyle has demonstrated professionalism, integrity, and a genuine commitment to understanding my financial goals. I feel that we have built a meaningful and trusting relationship that will certainly last for many years to come. Kyle's thoughtful guidance and strategic insight have already made a positive impact on the long-term management of my investments, and I have full confidence that his expertise will continue to deliver meaningful results in the future. I truly value the partnership we've developed and look forward to continuing to work together toward lasting financial success."

Craig Hale, Manager at High Speed Gas

"We held UK based pensions from previous employment in the UK and had zero knowledge of this field but had a small amount of money to invest. We found a company and signed up with an Agent who seemed to know what he was he doing. But sadly, we later discovered that he was actually doing very little. We were signed up for investments that gave him a nice commission and us little or no returns. Over the next few years we watched our pension fund lose more and more money. We then found that we could not make contact our agent. We spoke to a South African based investment advisor, who recommended that we approach Austen Morris Associates. AMA then sorted out the removal of our funds and we immediately began to see an improvement in

our remaining funds. The service we have received from Kyle has been beyond excellent. He has made the complicated business of investments far more simple. Kyle made changes to our portfolios and the platform that maintains them, which increased our returns and made it easier for us to track them. He has also made it super easy for us to make withdrawals when we have needed to.

We highly recommend his efficient and friendly service to future investors. We really are grateful that we were able to move our funds to AMA."

Gary & Nicky Welsh, Retired

"After 3+ years under Kyle's advising, I really feel to sponsor him publicly, as I always got prompt replies, top suggestions of investments and a broader support for other issues related to investments, not directly related to his actions. A warm and focused contact style, effective and customer driven approach. Thanks Kyle, please keep on this way, you'll always be on top!"

Paolo Ivagnilio, General Management & Executive Advisor at ING. Paolo Ivagnilio