



ALEX PITRO Consultant

“There is nothing wrong with having all your eggs in one basket, as long as you control the basket.”

- Les Brown

PROFESSIONAL ACHIEVEMENTS

- | Regulatory accreditation - Representatives RE5
- | FICA Awareness Training
- | Higher Certificate in Wealth Management
- | Class of Business - Investments, Long-Term Insurance, Pension Fund, Benefits, Short & Long-term deposits

PERSONAL ACHIEVEMENTS

- | Obtained Provincial Colours for playing Cricket - Western Cape
- | Headed up Employment Equality Committee
- | Raced Motor Cars Both Regionally & Nationally
- | Top Sales Performer 2015-2017

Alex has been specialising in International Financial Planning and Wealth Management since 2014. Managing a book of clients both locally and within the African continent.

Alex maintains detailed knowledge of investment updates so that he can provide bespoke solutions to a broad range of prospects and clients alike. Alex started his professional career entering his family business in Cape Town where he actively ran and managed 'Action Cricket Club' for five years.

He managed the company accounts whilst leading the team and overseeing the day to day operations of the club while delivering an exceptional client experience. In 2010 Alex moved into the Telecommunications industry to broaden his skill-set with a focus on sales, providing VOIP, Telephone and Internet solutions to businesses and individual clients. Alex then moved into the Marketing & Publishing arena, at New Media Publishing.

Established as one of the largest content marketing agencies in South Africa, Alex was appointed as the Business Relationship Manager, with a focus to grow the business through sourcing new clients and managing their extensive existing client base

AREAS OF SPECIALIST FOCUS

- | QROPS and SIPP structuring
- | Private wealth management
- | Offshore asset structuring
- | Excellent client service

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