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Introducing Fundela

*Wanderers,
15 October 2007*





Who is Fundela?

- **Fundela Fundis**
 - **A team re-united!**
 - **Financial services industry experience**
 - **Long-term savings experience**
 - **Trusteeship experience**
 - **Practical outlook**
 - **Independent**
 - **INSETA accredited**





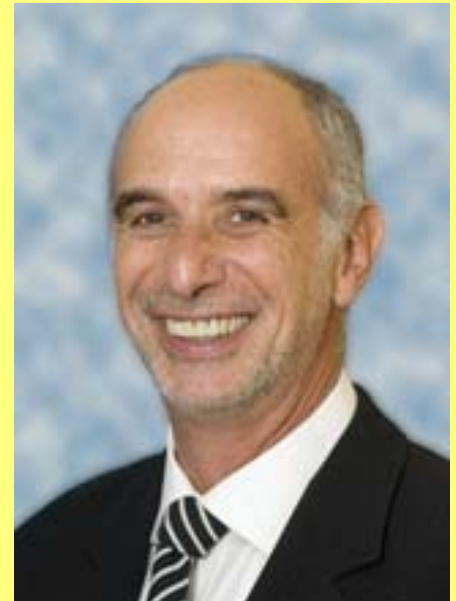
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Fundela Fundis

Jeremy Andrew



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Merle Friedman, PhD



Mike Garbutt





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Stephen Handler



Margie Naïdoo



What does Fundela do?

- **Educational Courses and support Services**
 - **Trustee education**
 - **Member retirement education**
 - **Personal debt management**
 - **Web site**
 - **Introduction to savings concepts**
 - **Ask the Fundis**
 - **Reference library**
 - **Industry Issue Seminars**
 - **Consulting**





Fundela target markets

- **Trustees – from newly-elected to well-versed**
 - Understand the fundamentals
 - Know the rules, or where to find them
 - Understand good governance
 - Use of judgment
 - Keep the human issues in mind
- **Members – courses targeted by age group**
 - Dedicated to a single client
 - Financial health
 - Investment choice
 - Psychological and physical health
- **Personal debt management**





The Trustee Course

- **Four days over four weeks**
 - **Comprehensive and intensive**
 - **Dedicated to a single client, or open to all**
 - **Maximum attendees about 20**
 - **Modular availability, flexible scheduling**
 - **Specialised courses under development**
 - **Asset management**
 - **Risk management**
 - **Basics of long-term saving**
(web-based)
- **Exercises, Case Studies**
- **Detailed course notes**
- **Assessment**

