

Tsholofelo Lesego Maruping

Financial Advisor
Currently Unemployed

CONTACTS

Diepkloof Ext Phase 3
Soweto

ltmasitenyane@gmail.com

Cell No. **078 579 9066**

Gender: **Female**

Availability: **Immediately.**
Willing to relocate.

PROFILE SUMMARY

Results-driven and client-focused Financial Advisor with a proven track record in delivering comprehensive financial planning, investment management, and risk mitigation solutions. Skilled in guiding individuals, families, and businesses through complex financial decisions while aligning strategies with long-term goals.

Adept at building lasting client relationships through trust, transparency, and performance-driven advice. Well-versed in regulatory compliance, tax-efficient planning, and wealth preservation. Known for analytical thinking, clear communication, and a deep understanding of financial markets and products.

EDUCATION BACKGROUND

Psychology – Pearson Institute

Year Obtained: **2017**

National Senior Certificate - New
Vision Secondary School

Year Obtained: **2011**

PROFESSIONAL SKILLS

- **Excellent Customer Service**

WORK EXPERIENCE

Financial Advisor – Metropolitan

June 2023 - April 2024

- ❖ Develop customized financial plans tailored to individual or business needs.
- ❖ Provide advice on investments, retirement, education savings, and estate planning.
- ❖ Assist with cash flow analysis, budgeting, and debt management.
- ❖ Recommend and manage investment portfolios based on clients' goals, time horizon, and risk tolerance.
- ❖ Monitor market conditions and advise on buying/selling strategies.
- ❖ Stay updated on stocks, bonds, mutual funds, ETFs, and alternative assets.
- ❖ Serve a diverse urban clientele including HNW individuals, entrepreneurs, professionals, and small business owners.
- ❖ Offer advanced strategies including tax optimization, trust planning, and philanthropic giving.
- ❖ Coordinate with accountants to minimize tax liabilities through smart asset allocation, charitable donations, etc.
- ❖ Help structure investments to ensure tax efficiency.
- ❖ Assess risks and recommend insurance products (life, disability, long-term care).
- ❖ Help clients understand how to protect assets and income.
- ❖ Maintain up-to-date records, risk profiles, and client communications.
- ❖ Engage in networking events, community functions, or corporate seminars to acquire clients.
- ❖ Use social media, digital tools, and referrals for lead generation.

Financial Advisor – Liberty

November 2022 - March 2023

- ❖ Talking to clients to determine their expenses, income, insurance coverage, financial objectives, tax status, risk tolerance, or other information needed to develop a financial plan.
- ❖ Answering client questions about financial plans and strategies and giving financial advice.
- ❖ Advising strategies for clients in insurance coverage, investment planning, cash management, and other areas to help them reach financial objectives.
- ❖ Reviewing client accounts and plans on a regular basis to understand if life or economic changes, situational concerns, or financial performance necessitate changes in their plan.
- ❖ Analyzing financial data received from clients to develop strategies for meeting clients' financial goals.
- ❖ Preparing or interpreting financial document summaries, investment performance reports, and income projections for clients.
- ❖ Implementing financial plans or referring clients to professionals who can help them.
- ❖ Managing and updating client portfolios.
- ❖ Contacting clients regularly to discover changes in their financial status.

- **Strong Communication** (Verbal & Written)
- **Retirement, Education, and Estate Planning**
- **Investment Strategy Development**
- **Goal-Based Financial Modeling**
- **Asset Allocation & Diversification**
- **Risk Tolerance Assessment**
- **Performance Monitoring and Rebalancing**
- **Tax-Efficient Investment Strategies**
- **Life, Disability, and Long-Term Care Insurance**
- **Risk Analysis And Mitigation**
- **Needs Analysis and Plan Customization**
- **Ongoing Client Communication and Service**

REFERENCES

Name and Surname: **Thelma Mamburu**
(Team Leader)

Company: **Metropolitan Life**

Contacts: **083 262 6112**

Name and Surname: **Keneilwe Modise**
(Manager)

Company: **Liberty**

Contacts: **079 672 2412**

Name and Surname: **Aubrey Khohloa**
(Manager)

Company: **Tinyeleti Conference Organizers**

Contacts: **082 393 8425**

Name and Surname: **Harley Rapetsoa**
(Manager)

Company: **Mahuma Group (Pty) Ltd**

Contacts: **011 664 0510**

Receptionist – Tinyeleti Conference Organizers

January 2016 - November 2020

- ❖ Maintain and grow the relationship with local key bookers through consultive services.
- ❖ A thorough understanding of principles and key drivers of customer satisfaction.
- ❖ Working with suppliers to secure savings and add value.
- ❖ Maximize all commercial opportunities for meetings and events.
- ❖ Effectively plan and manage client projects and deliver outstanding services to the client's specifications.
- ❖ Excellent venue knowledge maintained by site visiting, educational and familiarisation trips.
- ❖ Demonstrate commercial awareness through recommendations to clients and negotiations with suppliers.
- ❖ Good organization skills with the ability to prioritize responsibilities, meet client's deadlines and turn around high volumes of requests in peak periods.
- ❖ Accurate data input of the client's requirements into the system, keeping each inquiry up to date with any amendment.

Marketing Assistant – Mahuma Group (Pty) Ltd

January 2013 - December 2015

- ❖ Collaborating with the marketing manager, internal teams, clients and partners on marketing strategy.
- ❖ Helping identify marketing trends and key opportunities for innovation.
- ❖ Learning and working with various types of software for digital marketing.
- ❖ Working closely with sales and marketing department.
- ❖ Creating marketing materials such as white papers, case studies, and presentations.
- ❖ Giving presentations.
- ❖ Maintaining a marketing database.
- ❖ Providing administrative support to the marketing and sales team.
- ❖ Preparing, formatting, and editing a range of documents.
- ❖ Understanding company product and brand.
- ❖ General office duties.

COMPUTER LITERACY

- ❖ MS Word
- ❖ MS Outlook
- ❖ MS PowerPoint
- ❖ MS Excel

LANGUAGES

- ❖ English
- ❖ Setswana
- ❖ Afrikaans