

COMPANY PROFILE

2026

FINANCIALSERVICES.TTMBHA.COM

TTMBHA FINANCIAL SERVICES

WEALTH | ADVISORY | INSURANCE

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TTMBHA FINANCIAL SERVICES
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WELCOME MESSAGE FROM THE **CHAIRMAN & CEO.**



Welcome to TTMBHA Financial Services, where your financial success is our priority!

We are committed to providing you with personalised solutions, expert advice, and unwavering support to help you achieve your financial goals. Whether you're planning for the future, managing investments, or navigating complex financial challenges, we're here to partner with you every step of the way.

Let’s build a brighter, more prosperous future together!

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COMPANY **HISTORY**

2023

Our journey began with a simple yet powerful vision: to empower individuals and businesses to achieve financial security and success. Founded on principles of integrity, transparency, and dedication, we started as a small team passionate about making financial services accessible and reliable for everyone. With humble beginnings, we focused on understanding our clients' unique needs and building lasting relationships based on trust.

Over the years, we have grown, but our core values remain unchanged. Each milestone in our journey reflects our commitment to delivering exceptional service and innovative solutions that make a real difference.

Today, as we continue to grow and adapt in an ever-evolving financial landscape, we remain deeply rooted in the principles that have guided us from the start—helping you navigate your financial path with confidence and clarity.
Thank you for being part of our story, because together, we can create a brighter financial future.

2026

This year, our goal as a financial services company is to elevate the way we serve our clients and adapt to the dynamic financial landscape. We are committed to achieving the following: **Empowering Financial Growth:** Help our clients build wealth and secure their financial future through personalized strategies, sound advice, and innovative solutions.
Increase accessibility to our services, reaching more individuals and businesses who can benefit from our expertise.

Enhancing Technology:
Invest in advanced tools and platforms to provide seamless, secure, and efficient financial management experiences.
Strengthening Client Relationships:
Deepen our connection with clients by offering tailored solutions and consistently exceeding expectations.

Fostering Financial Literacy:
Launch initiatives to educate and empower our clients, enabling them to make informed decisions with confidence.
Sustainability and Responsibility:
Incorporate sustainable practices into our operations and advocate for responsible financial management. By staying true to our mission and innovating for the future, we aim to be the trusted partner our clients can rely on to achieve their goals. Together, let's make this year a landmark in financial success!

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VISION & **MISSION**

Our Vision

To empower clients in achieving their financial aspirations through personalised solutions and unparalled service.
We aim to create a sustainable and inclusive financial landscape that reflects the spirit of Ubuntu, ensuring prosperity for individuals, businesses and all Africans.

Our Mission

Our mission is to empower individuals and businesses to achieve financial confidence and success by delivering innovative, personalized, and trusted financial solutions. We are committed to fostering long-term relationships, promoting financial literacy, and driving sustainable growth for a brighter economic future."



Loyalty

We are dedicated to buildingenduring relationships withourcustomersbyprioritising their needs, goals, and financialwell-being.Our loyaltyisreflectedinourunwavering commitment to providing transparent, reliable, and innovativesolutionstailoredto each customer's unique journey.

Honesty

We believe that honesty is the foundation of trust and the cornerstone of every successful relationship. In all our interactions, we uphold the highest standards of integrity, transparency, and accountability. By communicating openly and acting with sincerity, we ensure that our customers can make informed decisions with confidence, knowing that their best interests are always our priority. We believe that honesty is the foundation of trust and the cornerstone of every successful relationship. In all our interactions, we uphold the highest standards of integrity, transparency, and accountability. By communicating openly and acting with sincerity, we ensure that our customers can make informed decisions with confidence, knowing that their best interests are always our priority.

Trust

"Trust is the bedrock of our relationship with our customers. We are dedicated to earning and maintaining that trust through consistent actions, ethical practices, and unwavering transparency. By always prioritising the needs and aspirations of our customers, we strive to be a reliable partner they can depend on, helping them navigate their financial journey with confidence and peace of mind."

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"OUR SERVICES ARE TAILORED TO MEET THE UNIQUE NEEDS OF BOTH INDIVIDUALS AND BUSINESSES."

TAILORED JUST FOR YOU

TAILORED JUST FOR YOUR BUSINESS



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TTMBHA FINANCIAL SERVICES

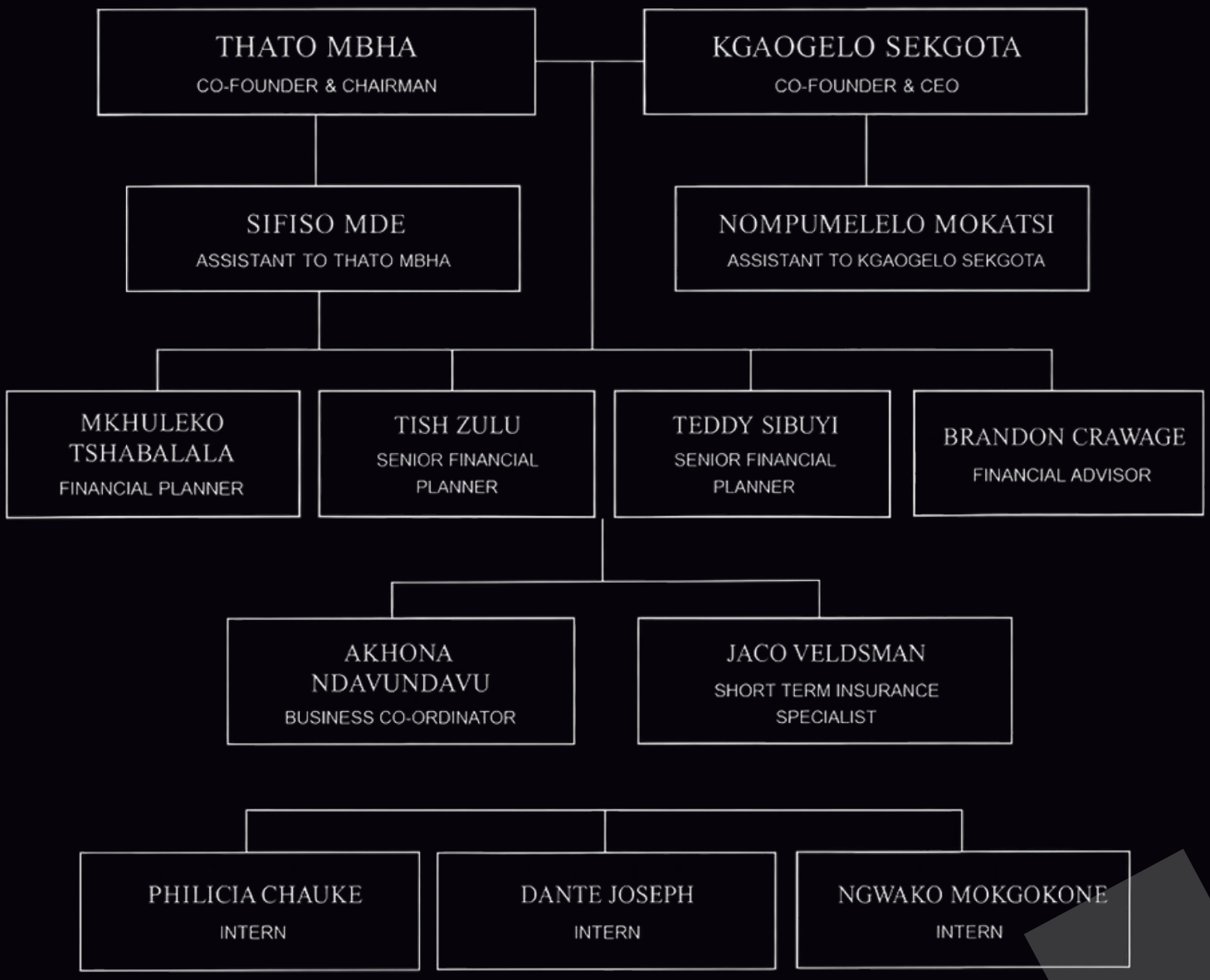
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OUR SERVICES:

- Wills and Trust
- Educational Planning
- Personal Short Term
- Employee Benefits
- Business Assurance
- Savings and Investment Planning
- Tax Free Investment
- Medical Aid.
- Life Cover
- Disability Cover
- Severe Illness
- Pre and Post Retirement Plan

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ORGANOGRAM



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OUR **OFFICE**

OUR TEAM COLLECTIVELY BOASTS 40 YEARS FINANCIAL SERVICES AND REAL ESTATE EXPERIENCE. WE ARE DEDICATED TO DELIVERING TAILORED FINANCIAL PLANNING SOLUTIONS THAT ARE INFORMED BY RESEARCH AND BEST PRACTICES. WE PROVIDE EXCEPTIONAL GUIDANCE IN THE SELECTION OF THE RELEVANT PRODUCTS TO HELP OUR CLIENTS TO ACHIEVE THEIR DESIRED FINANCIAL PROSPERITY.



TT MBHA : CHAIRMAN

Master Practitioner in Real Estate MP(RE)
Chartered Marketer South Africa CM(SA)
Social Entrepreneur



SIFISO MDE : ASSISTANT TO THE CHAIRMAN

New Venture Creations NQF 4



KGAOGELO SEKGOTA CFP ® : CEO

Bachelor of Commerce (BCom), Accounting **I** *Postgraduate Diploma in Financial Planning and Services* **I** *Postgraduate Diploma in Estate Planning Law I Postgraduate Diploma in Management I Management Advancement Programme I Master of Management, Digital Business | Certified Financial Planner (CFP)*



NOMPUMELELOMOKATSI : ASSISTANT TO CEO

Certificate in Short Term Insurance (NQF Level 5)

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OUR ADVISORS



TISH ZULU : SENIOR FINANCIAL PLANNER

BCom in Accounting I Certificate of Proficiency in Retirement Funds I Senior Management Development Programme I Lead for Performance Programme I Accredited Life Coach



TEDDY SIBUYI : SENIOR FINANCIAL PLANNER

National Certificate in Wealth Management (NQF Level 5)



MKHULEKO TSHABALALA : FINANCIAL PLANNER

BA in Human Resources & Psychology (NQF 7) | IISA Advanced Diploma in Insurance Practice (NQF 6) | Diploma in Management of Training (NQF 6) | Higher National Diploma in Human Resources (NQF 8 – in progress) | Assessor Certificate | FAIS RE Level 5 & 152 FAIS Credits | Coaching for Performance.



BRANDON CRAWAGE : FINANCIAL PLANNER

NQF 5 Banking Services Advice – Milpark Business School | RE5 Regulatory Examination – Moonstone



JACO VELDSMAN : SHORT-TERM INSURANCE SPECIALIST

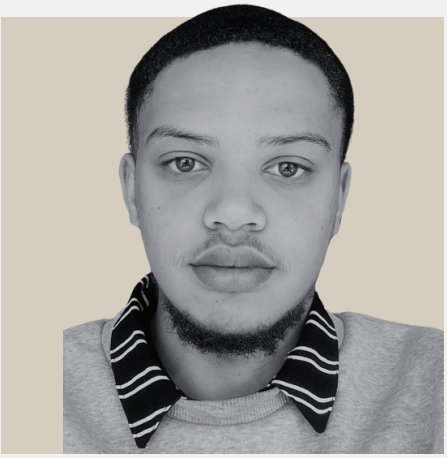
RE5 Accredited (Representatives Examination)
Fully FAIS Accredited / Fit & Proper status
COB200 – Class of Business

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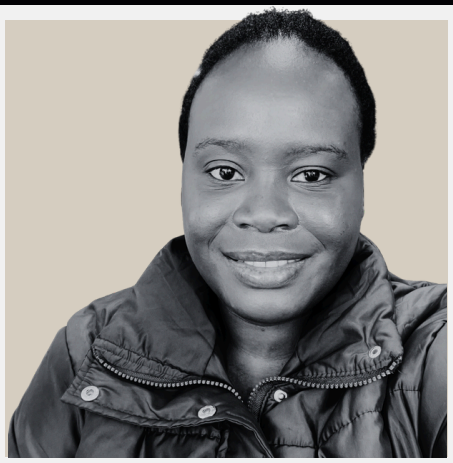
OUR INTERNS



NGWAKO MOKGOKONE
MARKETING INTERN



DANTE JOSHEPH
IT INTERN



PHILICIA CHAUKE
MARKETING INTERN



AKHONA NDAVUNDAVU
BUSINESSS CO-ORDINATTOR INTERN

OUR PARTNERS & CLIENTS

Sanlam

santam

ALLAN GRAY

Icebolethu Group

CORONATION

TRUST IS EARNED™

Discovery

VUYO'S FUNERALS

Ninety One

1Life

Changing Lives

RMA

Caring | Compassionate | Compensation

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