Trustees and principal officers of the FundsAtWork Umbrella Pension and Provident Funds and the Momentum Corporate Preservation Funds

effective from August 2017

FAWTD201708

Freek Kruger

Chairperson & sponsor trustee

BSc (Math & Math stats), BSc Hons (Math), NHED, ILPA

Freek started his career in 1986 with Sanlam as an actuarial consultant. He moved to Momentum in 1990 and has since been involved in valuations, retail product development, legal services for the retirement products and wealth product development. He is a trustee on numerous funds.

Yugen Pillay

Independent trustee

BCom Accounting Professional Accountant (SA)

Yugen has over 16 years accounting experience, was with Absa Bank for four years and PriceWaterHouseCoopers for two years. For the past 10 years he has been working at SizweNtsaluboGobodo. He started as a Senior Manager and progressed to Associate Director at the Accounting and Administration Services Division.

Lerato Makwetla

Independent trustee

BA LLB LLM (Tax Law)

Lerato has over 20 years of experience in the legal industry. For the past three years she has been employed at Barclays Bank and holds the position of Vice President: Legal Counsel. Prior to this she was employed as a Senior Legal Advisor at the Development Bank of South Africa. She was admitted as an Attorney of the High Court of South Africa in 1997 and also serves on the Board of the Mineworkers Beneficiary Fund.

Werner van der Veen

Sponsor trustee

FASSA, CFA

Werner joined Momentum in October 2000. He is a member of the capital management team of the Balance Sheet Management division, where he is responsible for the capital management of the shareholders' assets, the risk management of all shareholders market exposures as well as mergers and acquisitions. He is a member of the Financial Planning Institute of South Africa.

Katherine Barker

Sponsor trustee

BComm. (Actuarial Science), PGDip. (Actuarial Science), FIA, TPGDip (International Oil Supply and Trading) from OxfordPrinceton

Katherine joined Old Mutual in 2007 as a junior actuarial specialist, then became an intermediate actuarial specialist in 2009 and an actuarial consultant in 2011. She joined Momentum in 2011 as head of pricing for FundsAtWork. She is currently the Head of FundsAtWork.

Sandile Mbili

Independent trustee

BBusSc (Actuarial Science), BCom Honours (Financial Management)

Sandile started his career as an actuarial assistant with Old Mutual in 1980. He has had a long career with Anchor Life, Wits Centre for Developing Business, Munich Re-insurance Company, Safrican Insurance Company (he was the MD), Optimum Assurance and Momentum. He then joined Old Mutual in 2007 as a consulting actuary. Since 2014 he is self-employed, his company is srL Actuaries and Consultants. He is, amongst others, the advisor to the Member Services Pillar of the National Union of Mineworkers on various retirement fund matters and other member benefits and assists boards with closure of funds.

Alternate Trustees of the FundsAtWork Umbrella Pension and Provident Funds

Shaeera Essop

Alternate trustee

BSc, COP, CFP

Shaeera joined the industry in 2004 as a retirement funds consultant with Alexander Forbes. She moved to Absa Consultants and Actuaries as a strategic consultant and was then promoted to an operations manager. While there, she was chosen to participate in the Absa Development Initiative, which offers young people with potential a series of growth opportunities to enhance their ability to deal with complexity on both an emotional and an intellectual level. In 2013 she joined Momentum and is currently heading Strategic Client Services: Public Sector in the Corporate and Public Sector Segment.

Elsa Taylor

Alternate trustee

BComm (Hon), CA (SA)

Elsa is a chartered accountant and registered auditor. She obtained her BComm Honours degree from the University of Pretoria and did her articles at KPMG. She joined the employee benefits industry in 1996 and gained experience at Alexander Forbes and NMG. She joined Momentum in 2008 as head of the Retirement Fund accounting department and then was appointed as the Chief Financial Officer of FundsAtWork and Corporate Risk in the Employee Benefits Unit. She is currently the Chief Financial Officer of MMI Health.

Frank Richards

Alternate trustee

CA (SA), Diploma in financial markets and instruments

Frank qualified as a chartered accountant in 1992 and completed his articles at PwC. He joined the Fedsure Group in 1995 and spent most of his time working for the asset management company as a quantitative analyst and assistant portfolio manager. During this time he continued to study and obtained a diploma in financial markets and instruments. He joined the Alexander Forbes Group in 2001 and worked in the asset consultant area for the first three years, where he provided investment consulting services to a number of large clients. He moved to Investment Solutions in 2004 and was promoted to head of client servicing in 2008. Frank joined MMI in 2011 and is responsible for Client Servicing in the Corporate and Public Sector Segment.

Richard E Hall

Alternate trustee

Wits Business School Management Advance Programme

Richard joined Prudential in 1973 as a clerk in group business administration. From 1981 to 2005 he worked at Sage in various roles including management in group business administration. Since 2005, Richard has been working for Momentum, first in the FundsAtWork product management area and currently as a trustee liaison specialist in the MMI Investments and Savings team.

Principal Officer and Deputy Principal Officer of the FundsAtWork Umbrella Pension and Provident Funds

Tania Bakker

Independent principal officer

Post Graduate Diploma in Financial Planning (CFP)

Tania is a certified financial planner. She began working in 1995 in the employee benefits industry before moving to ABSA Consultants and Actuaries in administration, consulting and trustee training for seven years. Tania consulted for four years at Lekana Employee Benefits (incorporated into Momentum) and has been an independent principal officer since 2007.

Hettie Joubert

Deputy principal officer

BLC LLB LLM (Labour law)

Hettie obtained BLC and LLB degrees from the University of Pretoria and an LLM (Labour Law) degree from the Rand Afrikaans University. She is an admitted attorney who practised as such for four years before she joined the employee benefits industry in 1990. She joined Momentum as a legal adviser in May 2004. She is currently head of Retirement Fund Governance in the MMI Investment and Savings team.