

I DIDN'T CHOOSE THE ROLE, THE ROLE CHOSE ME

It seems that Lebogang Koloti was destined for his role at Gradidge Mahura Investments, his initial host for the [ASISA Academy Independent Financial Advisor \(IFA\) Internship](#), although his arrival was delayed by four years when his father passed away.

Those four years were certainly not wasted as Koloti learnt “just about everything he knows” at Futurum Financial Group, the Potchefstroom practice he was transferred to during the internship, allowing him to complete it and be near his family. He also had the valuable experience of being a ‘local expert’ commenting on financial news on a community radio station based in Potchefstroom.

Koloti didn't always seem destined for a job in the financial world. His brother had followed their parents into the South African Police Service, but Koloti always knew he wanted to do something different. He wasn't sure exactly what that was before hearing about the ASISA Academy IFA internship while in his final year of Honours in Financial Planning at the University of Johannesburg after completing his B Com Finance.

He applied to join the 2017 intake of the IFA Internship and was delighted when Gradidge Mahura Investments chose to host him. He remembers the work-readiness aspect of the IFA Internship well and says it is streets ahead of other programmes he has heard about. Koloti is very grateful for the introduction the interns were given. “People underestimate the training that they get, especially the softer skills. But you see the impact of it when you are working, and you face so many unexpected situations.”

After the work-readiness training, Koloti started working for Gradidge Mahura Investments and everything was going well until his father passed away suddenly a few months into his internship. He knew he had to go home to Potchefstroom to be with his mother.

Fortunately, he says, he received a lot of support from Gradidge Mahura Investments and from the ASISA Academy and he was able to continue his internship. The ASISA Academy arranged with the Futurum Financial Group that he could transfer and complete his internship with them in Potchefstroom.

After completing his internship, Koloti stayed with Futurum Financial Group for another four years, a time of intense learning and growth for him. In addition to learning so much about his profession, Koloti was one of a group of young financial services industry professionals who approached a local community radio station, Aganang FM, with the idea of making a series of financial education programmes for the community. This resulted in him becoming the radio station's financial expert on call. They would invite him into the studio when they needed help understanding financial indicators or unpacking issues like the national budget.

Then, an opportunity arose to rejoin Gradidge Mahura Investments as a financial advisor in Johannesburg, bringing Koloti's story full circle. He was pleasantly surprised to see how much the business had grown over such a short period of time.

Tatenda Macheka, a Certified Financial Planner (CFP) and practice manager at Gradidge Mahura Investments, said Koloti returned to Gradidge Mahura Investments with “the right attitude, that is, to learn and grow”.

“He was happy to start from the bottom, where he had to learn the new back-office paraplanning and compliance processes at GMI, which has helped him to become an advisor who understands the importance of following process and taking compliance seriously with his own clients,” said Macheka.

Koloti added: “It's no longer the same as it was when I joined them in 2017. It was a small firm then. It has grown and there are so many opportunities for you to grow as an individual. The support from senior advisors is amazing.”

Macheka agreed that new Financial Advisors at Gradidge Mahura Investments are offered a lot of support “to set them up for success”. He described Koloti as “an example of an IFA who has learnt the fundamentals of financial planning well and now has all the tools to help him grow his book with ease”.



Lebogang Koloti has come full circle to be an IFA at Gradidge Mahura Investments.

There is no doubt that Koloti made the most of his time away from Gradidge Mahura Investments, but he always stayed connected. "I used to keep in touch with the guys, we used to talk a lot and would attend the same events, including ASISA Academy alumni events. I think that made it easy for me to come back."

He feels like he really is in the right place. He enjoys being an IFA, he says: "I enjoy sitting in front of clients, listening and then using my knowledge and experience to assist them in whatever they are going through ... I say the role chose me rather than I chose the role."