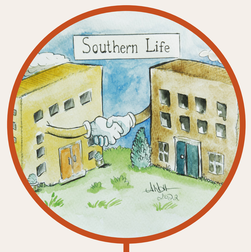
OUR STORY

1982

At 21 years old, Mohamed Javed Dalvie joined Old Mutual as a Admin clerk at Old Mutual Group Schemes

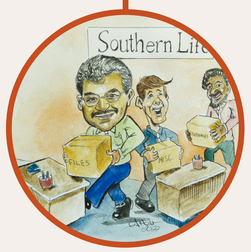
1982

July 1982 joined Anglo American Life as a Sales Representative



1989

1989 Anglo American Life & Southern Life merged to become Southern Life



1990

In 1990 - relocated to an office in Gatesville with the permission of Southern Life Management focussing on long term insurance

1991

1991 started the Short term division with Gulam Zalgoankir

1992

1992 won Top Achiever Award in the Western Cape for Southern Life & won an overseas trip to a Convention held in Disneyland, USA with family

1993

In 1993 founded a CC called Vessi Investments CC t/a PERSONIX for the short term insurance division

1994

In 1994 - completed his ILPA (Institute for Life & Pension Advisor) entrance exams and promoted to become a Profco member (group of elite Professional Consultants that specialised in Business Assurance like Buy & Sell, Contingent Liability cover etc)

1995

In 1995 - Became a member of the FPI (Financial Planning Institute) who were the body that provided all the courses in the Long term Insurance Indus- try .The ILPA was replaced with CFP which is Certified Financial Planner

1996

May 1996 - resigned from Southern Life & Lifegro (Who merged to form Momentum)
June 1996 - Registered MSD Investments CC for the Long term insurance division

1996

June 1996 - Long term & Short term entities started trading as PERSONIX FINANCIAL SERVICES

2006

In 2006- moved to bigger premises also in Gatesville and employed more support staff to a total of 5

2010

In 2010, son Mohamed joined the practise both on the Long Term & Short term side. He graduated from UCT in 2008 with a B Bus Science degree & worked for Kagiso Securities as a Financial Analyst for two years. He brought some new perspectives with fresh ideas to take the business forward into its next chapter

2016

April 2016-Waseem Mukuddem joined as a financial planner in addition to 2 additional support staff

2016

May - Dec 2016: Moved to 5 Kromboom Road Rondebosch. Brand redesign and relaunch value proposition

2018

2018 - Property management division started after seeing a need for a professional and trusted partner who can assist in achieving a net posi- tive return on client's property portfolios

OUR STORY

2020

2020- MJ Dalvie appointed on FIA board as Group Scheme Representative

Transition from in office to working remotely. Personix tilted into the virtual world to transition into a covid environment. In order to operate we needed to shift into a digital experience

2021

2021

March 2021 Partnered with ASISA in hosting learners at our practice for 12 months- trying to assist in changing the financial services landscape in SA and bringing new graduates into the industry

Expansion of our product offering into fiduciary services through a partnership with capital legacy Tazkiya.

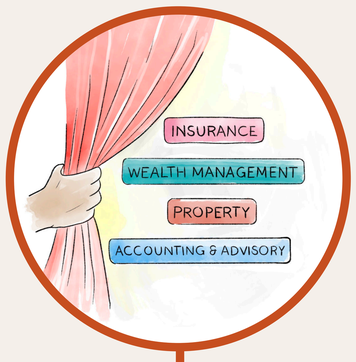
2022

2023

The property business expands and commences acquisition of Mayfair Real Estate

Personix Introduces Turkish property as an Investment opportunity

2023



2024

Personix Financial Group- Company Rebranding: Insurance, Wealth Management, Property, Accounting & Advisory

Leadership Transition Due to Unforeseen Event:

The business faced an anticipated eventuality when Mr. Jawed Dalvie was hospitalized. The succession plan was activated, and Mohamed Dalvie assumed leadership to ensure continuity

2024

2025

Our firm is entering a new era of leadership, focused on trust, innovation, and client success - A legacy leading to the future