

ASHLEY PAULIS

Financial Advisor

Ashley Paulis is a Financial Planner partnered with the attooh! Group as part of Discovery Limited. He specializes in holistic financial planning to accommodate his clients in every financial area ensuring that every need and objective is met.

In 2015 his mother lost her husband in a tragic car accident and to their fear, he had cancelled his life insurance policy 3 months prior to passing. In 2017 Ashley lost his uncle in a motorcycle accident, and this event opened his eyes to financial planning and the immense value it can offer! Seeing both ends of the spectrum, Ashley believes that Financial Planning is not merely a product but peace of mind, whether it be Death, Disability or Retirement that comes along each our paths at different stages of our lives.

"I have been in the Financial Services Industry for more than 5 years and through various roles I have gained valuable knowledge that I can rely on when advising my clients about the best possible solutions they need. I not only seek to assist my clients as a professional but also stand along side them throughout all of life's stages and be their when they need me the most. The one thing I value most working in this industry is acting with honesty and integrity."

"I firmly believe that by engaging with a client and really understanding their life, needs and objectives offers me the opportunity to not only assist them with financial products but create a road-map of where they are, where they want to be and the steps that need to be taken to get there. Financial Planning has always been a topic not always discussed, and I seek to change that."



CONTACT

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QUALIFICATIONS

Regulatory Exam | FSP, 2016



BUSINESS EXPERIENCE

Telesure Investment Holdings | 2.5
Years

Envestpro Pty Ltd | 2 Years



Discovery



DOES YOUR MONEY NEED A “PROFESSIONAL TRAINER”?

Financial planning is more than just numbers on a piece of paper. It's about your life – and what you want out of it. Do you understand where you are? Do you know what your financial goal is? How about the security of your family's future? Financial planning connects life with finance and evaluates the assets needed to help make a dream come true. We use financial tools to help us learn about your goals to offer guidance for every step of your journey in this unpredictable life.

MY SERVICES INCLUDE



INDIVIDUAL / FAMILY INSURANCE

- Life cover
- Disability
- Severe Illness
- Income continuation benefit
- Tax Free Investment/savings
- Retirement planning
- Educational savings



BUSINESS INSURANCE

- Keyman Insurance
- Buy/Sell Agreements
- Contingent Liability



PERSONAL BANKING



HEALTH

- Medical aid
- Gap cover



INVESTMENTS

- Local, guaranteed and offshore
- Retirement investments



SHORT TERM INSURANCE

- Personal lines
- Commercial lines



FIDUCIARY

- Wills and Estate
- Trusts



EMPLOYEE BENEFITS

- Group Risk
- Retirement Funds
- Group Health Solution



VITALITY REWARDS

- Wellness management
- Wellness days

Every client is unique and so is my process in my practice. Allow my team and I to create a personalised, tailor-made financial solution for you. My advice is based on your needs and wants and I will truly commit to your overall financial and holistic success. **Financial freedom could be your reality.**



THE BUTTERFLY EFFECT

The butterfly with its metamorphosis - alludes to our lives as humans. Change is the ONLY constant. We celebrate growth, change and your own personal metamorphosis. We'll be there on the journey to guide and assist you toward a life of "permanent purpose".