DALE CORNELSON

Financial Advisor

Dale Cornelson, a Financial Advisor affiliated with attooh! specializing in Life and Disability Assurance, Risk Planning, Investment Savings and Planning, Healthcare Planning, Pre- and Post-retirement Planning, Shortterm Insurance, Discovery Insure, Corporate Employee Benefits, Wellness and Vitality benefits, Corporate Benefits, Income Tax advice and Investment management."

The combination of my personal background, experience and qualifications enables me to provide expert financial advice, and along with my proficient team of support staff, I am able to assist you in the implementation of a holistic, personal plan to achieve your financial goals, providing valuable knowledge and guidance along your journey to financial wellness.

Dale has been in the financial industry for a number of years and in this time has held various roles at some of the most prominent Insurance Companies, Old Mutual and Discovery in South Africa and is Financial Planner." I do not merely sell products to my clients, I create and implement a financial solution that is best suited to them based on their current financial needs and wants. I provide them with the tools that they require to place them in a better position than what they were in before, so that the idea of reaching their financial goals becomes a reality.

In much the same way you'd enlist the help and advice of a professional when dealing with issues of a medical or legal nature, financial planning generally requires the same type of specialized input from a financial adviser. Calculations around life expectancy, replacement ratios and draw downs are often complicated, and as a consumer you might not be aware of all the financial products on offer, which is why the help of a professional like myself can be invaluable. Trust is the most important aspect in the client-adviser relationship. Trust is built on a number of character traits, including honesty, integrity, competence and a commitment to acting in clients' best interests. Trust sustains the business relationship between the financial adviser and the client. The advice needs to be done correctly and believe based on that the right product is sold for the right reasons.

Dale understands that in this volatile economic environment, it is important to stay focused, knowledgeable, and goal-orientated within every aspect of your financial portfolio. His objective is to guide clients to financial success, by protecting their dependants, and businesses and employees, from unexpected life events, adding value to their journey to financial freedom.

"In association with the attooh Group of Companies and with a proficient team of support staff, Dale offers an expert hand in the planning of his clients' financial future, and is passionate about guiding clients in their financial potential, ensuring their future financial success!"

I strive to continuously improve my skills and knowledge in all aspects relating to the services and products that I advise on to ensure that I offer the very best financial solutions that are seamless and deliver on their promises, and to ensure that I am aware of the latest legislative changes and industry practices, ensuring that my clients continually receive the personalized solutions, and reap the rewards of being a Discovery client and benefiting from their dynamic product range and innovative reward structure.

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CONTACT

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QUALIFICATIONS

NQF 5 | Milpark | 2012

RE 5 | Moonstone | 2012

BUSINESS EXPERIENCE

Old Mutual | 3 Years 7 Months

Nedbank | 1 Years

Discovery | attooh! HEALTH | WEALTH | LIFE

DOES YOUR MONEY NEED A "PROFESSIONAL TRAINER"?

Imagine a world where finance is associated with **LIFE, TIME** and **GROWTH** rather that **ANXIETY** and **STRESS**? At attooh! We believe that your financial journey should and could be a journey of enjoyment, fulfilment and escalating success.

It really is time to put **YOU** first. Take control of your finances and allow me, as your Financial Coach to guide you along the way.

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 insurance

FIDUCIARY

- Wills and Estate
- Trust and Tax solutions

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".