

HEINRICH BLUMENTHAL - CFP®

CERTIFIED FINANCIAL PLANNER®

Heinrich Blumenthal is an Independent Financial advisor affiliated with attooh specialising in Life and Disability Assurance, Risk Planning, Investment Savings and Planning, Healthcare Planning, Pre- and Postretirement Planning, Short-term 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.

I have been in the financial industry for more than 30 years. I started my career at Sanlam and in this time have held various roles before becoming an Independent Financial Adviser during 2003, because I believe that every person should receive impartial and independent advice in order to make informed decisions. I am a Certified Financial Planner associated with the FPI.

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.

Being passionate about clients wellbeing, I understand that in this volatile economic environment, it is important to stay focused, knowledgeable, and goal-orientated within every aspect of your financial portfolio. My 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, I offer an expert hand in the planning of 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 personalised solutions.

Heinrich Blumenthal

Financial Advisor



CONTACT

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QUALIFICATIONS

Post Graduate Diploma | Financial Planning | University of the Free State | 2011



BUSINESS EXPERIENCE

Sanlam | 14 Years
Discovery IC | 5 Years
Independent Broker | 16 Years



DOES YOUR MONEY NEED A "PROFESSIONAL TRAINER"?

Imagine a world where finance is associated with **LIFE, TIME** and **GROWTH** rather than **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



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

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".