

QUINTON LOTZ

Financial Advisor

If you're looking for a trusted financial partner to help you navigate the complexities of financial planning, I am here to provide expert guidance and tailored solutions designed around your unique needs and goals.

Based in George, in the heart of the Southern Cape's Eden Region, I work with individuals, entrepreneurs, and business owners to create financial strategies that ensure wealth preservation, risk management, and long-term security. Financial planning is more than just managing numbers—it's about protecting what matters most, building a future you can rely on, and making informed decisions that lead to lasting financial freedom.

With the support of a skilled team, I offer a comprehensive range of financial services, including:

- * Personal financial planning: life cover, disability cover, income protection, retirement planning, tax-free savings, estate planning, and education savings.
- * Business financial solutions: keyman insurance, buy/sell agreements, employee benefits, group risk schemes, and business continuity planning.
- * Investment management: local and offshore investments, guaranteed income solutions, and long-term wealth growth strategies.
- * Fiduciary and estate planning: wills, trusts, estate structuring, and succession planning.

For business owners, I also assist in setting up group schemes and employee benefits to help secure their team's financial well-being while safeguarding the business's long-term stability.

With 30 years of experience in the financial sector, including 17 years working with High-Net-Worth clients, I have built strong, long-term relationships based on trust, integrity, and delivering real results. Every client is different, which is why my approach is always personalized and tailored to meet specific needs. Whether you're looking to grow your wealth, secure your family's financial future, or protect your business, I focus on structuring financial plans that provide security and peace of mind.

I hold a BBA and MBA from North-West University and continuously invest in expanding my knowledge to ensure that I provide up-to-date, effective financial strategies. My goal is to simplify the financial planning process, giving you clarity and confidence in your decisions while ensuring that every aspect of your financial future is taken care of.

If you are looking for a financial advisor who puts your needs first, I am here to help. Let's work together to create a clear, effective financial plan that aligns with your goals and gives you the confidence to move forward with financial security.



Financial Advisor



CONTACT

Website

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Physical Address

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Building George



QUALIFICATIONS

BBA | North West University, 1999

MBA | North West University, 2002

NQF8 | Inseta, 2002

RE 5 obtained | FSB, 2011



BUSINESS EXPERIENCE

Absa | Private Banker, 17 years

Absa | Branch Manager, 3 years



Discovery



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



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".