

RIAAN SCHALKWYK

Financial Advisor

Welcome to a financial journey guided by knowledge, empowerment, and an unwavering belief in the power of an abundance mindset. I am Riaan Schalkwyk, an experienced and dedicated Financial Advisor committed to making ordinary people millionaires and millionaires financially independent through applying an abundance mindset. My personal motto, "Unlocking your potential for extraordinary wealth and happiness," encapsulates my vision of empowering individuals like you to achieve true financial abundance and live a life of fulfilment.

With a strong background in the financial services industry, including tenure at respected insurance companies like Old Mutual, Sanlam, and Discovery. I bring a wealth of expertise and insights to the table. Through continuous professional development, I stay ahead of the curve, ensuring that I am well-informed about legislative changes, taxation, products, practices, and industry news. I actively seek out learning opportunities, attending workshops, seminars, and training courses to remain at the forefront of industry advancements. This commitment to ongoing education allows me to offer you the most relevant and up-to-date financial solutions.

Partnering with the esteemed attooh! Group of Companies, I have access to a comprehensive range of corporate and individual financial services. This affiliation enables me to provide you with a comprehensive, personalized plan that aligns with your unique financial goals. Together, we will work to develop strategies that drive your financial success and empower you to unlock your full potential.

I understand that financial well-being extends beyond mere numbers; it is about creating a life of extraordinary wealth and happiness. By embracing an abundance mindset, we can transcend limitations and tap into limitless possibilities. With my guidance and support, we will navigate every stage of your financial journey, from wealth creation to wealth preservation. In addition, we will develop a secure financial plan that takes into account risk management, insurance coverage, and estate planning to provide you with a sense of security and protect your financial future.

Allow me to share my knowledge and expertise, contributing to your ultimate triumph. Together, let's embark on this transformative journey, as we forge a lifelong bond and navigate the path to financial abundance. I will be with you every step of the way, providing personalized solutions tailored to your unique needs. Let's create a future of financial abundance, unlocking your true potential.



Financial Advisor



CONTACT

Website

www.riaanschalkwyk.co.za

Email Address

riaan.schalkwyk@attooh.co.za

Mobile Number

+27(0) 82 952 3423

Physical Address

17 Sarazen Road, Cape Town, 7441



QUALIFICATIONS

Certificate in Financial Planning
(Damelin),

RE Qualification



BUSINESS EXPERIENCE

Old Mutual | *Personal Financial
Advisor, 2002 - 2012*

Sanlam | *Independent Financial
Advisor, 2012 - 2014*

Mondaine / Vital Consult |
*Independent Financial Advisor, 2014
- 2022*

attooh! | *Financial Advisor - Discovery
Group Independent Contractor, 2022
- current*



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".