

# WALDO DU PLESSIS

## Financial Advisor

I am a Financial advisor affiliated with attooh! Group of companies specializing in Life and Disability Benefits, Risk Planning, Investment and Savings Planning and management, Healthcare Planning, Pre and Post-retirement Planning, Short-term Insurance, Discovery Insure, Corporate Employee Benefits, Wellness and Vitality benefits."

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 since 2014 and in this time has held various roles at some of the most prominent Insurance Companies in South Africa. Before I became a Financial Advisor, I worked in the hospitality industry serving some of the most prominent public figures and celebrities.

My passion is to assist and help clients meet their long and short-term financial goals and assist them with making sound financial decisions in a market that tends to change constantly. 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.

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, 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 can offer an expert hand in the planning of my clients' financial future and I am 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.



## CONTACT

### Website

[www.waldoduplessis.co.za](http://www.waldoduplessis.co.za)

### Email Address

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### Mobile // Office Number

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### Physical Address

Girdwood Avenue, Boskruin,  
Randburg



## QUALIFICATIONS

Certificate in Accommodation  
Services | LIS Hotel School, 2003

Diploma in Food and Beverage | LIS  
Hotel School, 2003

NQF Level 5 Wealth Management |  
Inseta, 2020



## BUSINESS EXPERIENCE

Financial Advisor | *Trigger Capital a  
juristic representative of Discovery*, 2  
years & 8 months

Financial Advisor | *Momentum*, 3  
years & 5 months

Operations and Beverage Manager |  
*Summer Place Conference and  
Banqueting Venue (Sandton)*, 6 years



Discovery

attooh!  
HEALTH | WEALTH | LIFE

# 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".