PIERRE VERMEULEN

Branch Director & Financial Advisor

"As a seasoned Financial Advisor with 24 years of experience, I specialize in crafting personalized financial solutions that empower individuals, families, and businesses to achieve their goals and secure their financial futures.

With a deep understanding of the complexities of the financial landscape, I provide expert guidance in investment management, retirement planning, estate planning, and wealth protection. My approach is centred around fostering long-term relationships, listening attentively to clients' needs, and delivering tailored strategies that address their unique circumstances.

Throughout my career, I have demonstrated a passion for helping clients navigate life's milestones, from saving for education expenses to planning for retirement.

As a trusted advisor, I am dedicated to providing exceptional service, unbiased advice, and ongoing support to help my clients achieve financial peace of mind. I understand that seeking financial guidance can be daunting, and I want to assure you that my approach is built on trust, transparency, and your best interests.

I'd like to address some common concerns upfront:
- Confidentiality: I maintain the highest level of discretion and adhere to industry standards for data privacy.
- Cost: Commission is normally paid by the product provider and not the client but where otherwise I offer flexible fee structures and will clearly outline my services and expenses before we begin.
- Embarrassment: I've worked with numerous clients facing various financial challenges, and I'm here to support you without judgment.
- Intimidation: I'll explain financial concepts in a clear, understandable way, ensuring you feel empowered and informed.
- DIY mentality: While you may be capable of managing your finances, my expertise can help you optimize your financial well-being.
- Past negative experiences: I'll work tirelessly to regain your trust and demonstrate the value of a trusted financial advisor.
- Procrastination: Let's work together to prioritize your financial goals and create a sense of urgency.
- Fear of loss of control: I'll collaborate with you to ensure you feel comfortable with every decision and maintain control over your finances.
- Lack of understanding: I'll educate you on the benefits and value of financial planning, helping you make informed decisions.
- Personal privacy: I respect your privacy and will only request information necessary to provide personalized guidance.

By addressing these concerns, I aim to establish a foundation of trust and understanding. If you're ready to take the first step towards financial confidence, let's connect and start a conversation.

Pierre Vermeulen

Branch Director & Financial Advisor

CONTACT

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QUALIFICATIONS

LLB (UNISA), RE1, RE5, COB

BUSINESS EXPERIENCE

attooh! Group of Companies | *Branch Director & Financial Advisor, 2013 -current*

Old Mill Wealth Management | *Principal & Key Individual, 2015 - 2024/01/01*

National Financial Advisors | *Principal & Key Individual, 2009 - 2012/01/01*

Bluezone Investments | *Investment Property Consultant, 2005 - 2009/01/01*

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".