

GARETH RENNIE

Financial Advisor

I am passionate about and committed to my clients achieving their financial and personal dreams. I strive to provide the highest level of financial planning and advisory services. I specialize in engineering bespoke financial solutions to meet the unique needs of my clients, blending analytical skills, critical thinking and problem-solving expertise with the latest technology and specialised collaborative planning tools.

I have a diverse range of experience in Finance having started my career as a Financial Analyst at DMO Inc, a commercial legal firm based in Sandton, South Africa. Working closely with senior partners I had the privilege of gaining invaluable mentorship. The experience gained by being exposed to the financial and legal dimensions provided me with a solid foundation and a comprehensive understanding of business. When my mentors separated our division to form RichRen Capital, I seized the opportunity to acquire further expertise in Business Turnarounds, M&A's, Deal Structuring, and Raising Finance.

Twelve years ago, I discovered my true passion - Financial Planning. I hold a B. Comm (Financial Management) and am committed to ongoing learning and professional development staying up-to-date with the latest trends and best practices in the industry.

At attooh! I am surrounded by an exceptional team and have access to unique resources, enabling me to provide unparalleled services to my clients. Leveraging my diverse experience across various sectors and industries, I am capable of comprehending the complexities and difficulties associated with managing finances for individuals and businesses in today's fast-paced world.

I am dedicated to providing personalised solutions to meet the unique needs of each client. I firmly believe that successful financial planning requires collaboration between client and advisor, which is why I use cutting-edge tools to facilitate real-time collaboration and decision-making. I work closely with my clients to gain a deep understanding of their unique needs and goals. Taking a holistic view my proprietary planning tools and team of experts allow me to create a customized, dynamic financial plan for each client that takes into account their current financial situation, future goals, and risk tolerance.

I understand that life can be unpredictable, and financial plans need to be flexible enough to accommodate unexpected changes. My aim is to provide my clients with the ability to pivot when necessary, so that they can adapt to unexpected events and take advantage of opportunities as they arise. My dynamic planning process ensures that the plan is constantly updated and adjusted as needed to ensure that it remains relevant and effective.

My commitment to using technology to enhance my services allows me to offer unique solutions to my clients. I use data analytics and modelling to "Battle Test" plans against multiple scenarios, testing them against real-life scenarios to ensure their effectiveness. This approach allows me to provide my clients with a comprehensive view of their financial situation and plan for the future as well as a distinct understanding of what impact each choice can have on their lives.

I understand that financial planning can be complex and overwhelming, which is why I provide ongoing support and guidance to my clients. We use the latest technology to keep our clients informed and up-to-date on their financial status and I am always available to answer questions and provide advice.

I am dedicated to providing my clients with the highest level of service and expertise. I strive to build long-term relationships with my clients and am committed to helping them achieve their financial goals and dreams. Whether planning for retirement, investing for the future, growing your business, or safeguarding your family against unforeseen circumstances, I am equipped to offer well-informed advice that positively impacts the future of you and your family.



CONTACT

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QUALIFICATIONS

B. Comm (Financial Management) |
University of Johannesburg



BUSINESS EXPERIENCE

DMO Inc | *Financial Analyst, 6 years*

Discovery IC | *Financial Advisor, 12 Years*

attooh! | *Financial Advisor, current*



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".