

LEE ERNSTZEN

Certified Financial Planner

I have always had a passion for helping people in general, but when I help them with their financial planning, I not only help the person, I also help protect their loved ones, their families and their legacy.

I started my career as a financial advisor with Liberty in December 2009. With more than a decade of experience, I have built up a successful financial practice with friends who became clients and clients who became friends. Great relationships are a Marathon, not a Sprint.

I completed my Postgrad in Financial Planning through Stellenbosch University in 2014 and went on to become a Certified Financial Planner in 2015.

In 2017 and 2018 I served as Regional Chair for the Liberty Financial Advisor's Forum representing all the financial advisors from the Western Cape at the National Forum. Within a blink of an eye Covid arrived in 2020 and that showed me how everything can change without a warning. This showed me that we only live once and that we really need to look after one another, family, friends and neighbors. We need to be kinder, have more compassion and we need to love more, because behind every smiling person, there's a story.

In October 2021, I joined Attooh to be able to offer my clients a range of financial services. My holistic approach to financial planning has helped my clients and their families over the many years and I look forward to doing the same for you and your family, providing you with comprehensive advice.

Are you ready to start your financial journey?



CONTACT

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QUALIFICATIONS

RE5 - Regulatory Exam | *Moonstone, 2011*

National Certificate in Financial Planning | *Milpark, Feb 2014*

Post Graduate Diploma in Financial Planning | *University of Stellenbosch, Dec 2014*

Certified Financial Planner | *Financial Planning Institute of Southern Africa, 2015*

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



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

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".