

JACOM VAN WYK

Financial Advisor

As your dedicated financial coach, I prioritise your needs above all else, offering fresh perspectives and cutting-edge financial strategies tailored specifically to you. At 21, I bring youthful energy and modern insights, combined with unwavering dedication to your financial success, ensuring personalised and innovative solutions throughout your financial journey. With tailored advice, I will guide you through the financial landscape, helping you achieve financial independence. Your unique goals and dreams deserve a customised plan, and I am committed to making financial freedom your reality. Let's build your future together with passion and precision.

Allow me to share a bit more about myself.

I am a 21-year-old financial advisor, currently holding my RE5 certification and actively working towards obtaining my Certified Financial Planner (CFP) designation. With a year of industry experience, I have already established a solid foundation in financial advising, driven by a passion for helping clients achieve their financial goals. My professional journey is further supported by my membership in the Insurance Institute of South Africa, ensuring I stay updated with industry standards and best practices.

My journey into the financial industry began with a strong desire to make a difference in people's lives by helping them manage their finances effectively. I quickly realised that financial freedom is not just about having money but about making informed decisions that align with one's personal goals and values. This realisation has been the cornerstone of my approach to financial advising.

My youthful enthusiasm and commitment to continuous learning allow me to offer fresh, innovative solutions to my clients. I understand that the financial landscape is constantly evolving, and staying ahead of these changes is crucial. This is why I invest time in expanding my knowledge and skills, ensuring that I provide my clients with the most current and effective strategies.

In my practice, I prioritise building strong relationships with my clients. I believe that understanding your unique needs, aspirations, and challenges is essential to crafting a financial plan that truly works for you. Whether you are just starting your financial journey or looking to optimise your existing strategies, I am here to provide guidance every step of the way.

My approach is holistic, taking into account all aspects of your financial life. From budgeting and saving to investing and retirement planning, I provide comprehensive advice tailored to your specific situation. My goal is not just to help you manage your finances but to empower you with the knowledge and confidence to make sound financial decisions.

Outside of work, I am passionate about staying active and involved in my community. I believe that giving back and staying connected with others enriches both my personal and professional life. This involvement also helps me understand the diverse needs and perspectives of different people, further enhancing my ability to serve my clients effectively.

In conclusion, I am dedicated to being more than just a financial advisor; I strive to be a trusted coach and partner in your financial journey. With my fresh perspectives, commitment to your success, and a personalised approach, I am here to help you navigate the complexities of the financial world and achieve the financial freedom you deserve. Let's embark on this journey together and make your financial dreams a reality.



Financial Advisor



CONTACT

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BUSINESS EXPERIENCE

Dotsure | *Insurance Consultant*

Old Mutual | *Financial Advisor*



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".