

RUAN OOSTHUIZEN

Financial Advisor

I am a Financial advisor and proud member of the attooh! Group of Companies, an award winning, Financial Advisor Group with a national footprint. At attooh! I specialise in a full spectrum of corporate and individual financial services. I am passionate about providing clients with tailor-made financial plans, personalised financial education packages, as well as forming lifelong bonds.

I relate to the company icon, the butterfly, as I believe in a metamorphosis of dynamic change and improvement. I believe in helping my clients achieve this transition. This goes hand-in-hand with our company motto: "We make ordinary people Millionaires and make Millionaires Financially Independent". With my qualifications, experience and an incredible support staff, I am confident that I can guide my clients to become financially independent Millionaires by implementing holistic, personalised plans to achieve their financial goals and freedom.

I have a wealth of experience in the Financial Advisory field and have been in the industry since 2018. Prior to taking the leap as a financial advisor, I was employed by Discovery in a consulting role where my hard work was recognised and I was awarded the prestigious Platinum SEAL award. I believe that knowledge is an important part of my evolution and continue to expand it by attending regular training seminars, staying abreast of the changes in the industry and being inquisitive of what is going on around me. I obtained my RE1 and RE5 qualification in 2018 and I am currently studying towards my CFP™. It is important to me that I add constant value to my clients and their businesses, so I stay up-to-date on legislation, taxation, products, practices and industry news.

My association with the Discovery Group means I am able to offer my clients the best financial solutions from a dynamic product range, as well as the benefits of the innovative Discovery rewards programme.

These tailor-made packages, as well as my personalised service, help my clients to make their financial dreams a reality. I strive to add value to both their experience and their lives, as we move through the evolution of their financial status. In this uncertain economic climate, it is important for me to maintain a hands-on approach, to ensure that I protect my clients and their businesses from expected and unexpected changes.

With my team at attooh! I am able to guide my clients on their own financial metamorphosis to achieve their full potential and financial success. Thank you for partnering with me on this exciting journey!

Ruan Oosthuizen

Financial Advisor



CONTACT

Website

www.ruanoosthuizen.co.za

Email Address

ruan.oosthuizen@attooh.co.za

Mobile // Office Number

+27(0)65 925 6351 //

+27(0)87 188 3365

Physical Address

72 Hole-in-One Avenue, Ruimsig
Office Estate, Unit 4, Suite 2



QUALIFICATIONS

National Certificate in Wealth
Management (NQF level 5)

RE1 Regulatory Examination: FSPs
and Key Individuals in all Categories
of FSPs

RE5 Regulatory Examination:
Representatives in all Categories of
FSPs



BUSINESS EXPERIENCE

TriHead Financial Services | 2018 -
2019

Discovery Consulting Services | 2019
- 2021

attooh! Financial Services | 2021 -
present



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

- Homeloans



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 BENEFIT SOLUTIONS

- Group Risk
- Retirement Funds
- Group Health Solutions



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".