

BEVERLY COETZEE

Financial Advisor

I have been with attooh! since September 2013 as Group Independent Contractor. I have been in the industry since January 2007. I started my Financial Advisory career as Broker Assistant and was then promoted to Office Manager for Capricorn Financial Advisors which was the start of my career as Financial Advisor. Providing efficient customer orientated services to my clients is my main goal.

This service includes:

- Personal Risk planning for Death/Disability and Severe Illness.
- Retirement Planning
- Estate Planning including Will & Trust Services
- Investment & Savings
- Personal Short Term Insurance
- Corporate Employee benefit
- Medical Aid

I do not specialize in only one field because I believe that I will be able to address all my client's needs in my business practice. I have got NQF Level 5 with 67 credits, I am working towards my full qualifications which will be NQF level 5 with 120 credits.

I do not distinguish between race or gender therefore my current client basis is very diversified. It is important for me that my clients trust that I will give them advice which is sound, fair and correct as prescribed by the Financial Services Act.

I enjoy being at home with my family just relaxing after day's work and also socializing with friends. I am happily married and is the mother of 2 children.



CONTACT

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Bendor



QUALIFICATIONS

NQF Level 5 120 credits | *Milpark*

NQF Level 5 with 67 credits achieved
| *Capricorn Financial Advisors, January 2007 - August 2013*



BUSINESS EXPERIENCE

Melchior Lee | *Capricorn Financial Advisors, January 2007 - August 2013*

attooh! | current



Discovery



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 Estates
- 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".