

# FRANS MATHIAS

*Financial Advisor*

I have been in the industry for nearly 30 years during which time I have got to know the Insurance industry very well. I have through my experience and professional studies gained the knowledge I need to provide clients with the correct options for their Risk-- Investment- Health and related Insurance needs.

I provide the right solution to potential and definite situations. In Life-I solve problems & I create peace of mind. I strive to give the right advice - with the right product to create a solution for you as client - and your family or Business needs. I believe in Integrity, Honesty and Fairness. Peace of mind is what I offer to you as client.

The idea is to give them the very best product for the best they can afford. I provide advice on Discovery Products as they have market leading products, with absolutely unique features. The complete Discovery Integration in action is where I specialise to guide you with achieving your Personal or Business goals.

Our office provides our clients with personal attention—and we will make sure that your queries and problems are taken care of to the best of our ability. Making sure that you as client receives the one stop service in your Financial Journey.

“Frans has been doing our entire family and business insurance for almost 20 years now. He has always been there for us!” - GREENZONE ENERGY

“Frans handles all our Risk and Investments with Discovery and has always given us outstanding service” - R Sheikh enterprises

“He has become a friend and has always given us the correct and factual advise”  
- ACS SECURITY



## CONTACT

### Website

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### Email Address

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### Mobile & Office Number

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### Physical Address

attooh! Consulting, Durbanville,  
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## QUALIFICATIONS

BA Communication | 1973



## BUSINESS EXPERIENCE

Liberty | Financial Advisor 1992-1996

FP Mathias Brokers | Owner Director  
1996-2009

Discovery | Financial Advisor 2009-  
2023



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 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".