

# WIAN BOTHA

## Financial Advisor

I am a Financial advisor affiliated with the attooh! Group of Companies and Discovery Group, which delivers tailor-made and diversified financial planning solutions to individuals and corporate companies on a national scale.

The combination of my personal background, experience and qualifications enables me to provide you with expert financial advice and Intermediary Service. My objective is to guide you through your financial journey and to add considerable value to you and/or your company's financial wellness. With the assistance of my proficient team of support staff, I am able to assist you in implementing a holistic, personalised plan to achieve your financial goals.

I spent most of my earlier years in the corporate environment, managing businesses and doing personal financial planning. I soon realised the importance of family, the limited time one has and the importance of having a plan. Life can change at the blink of an eye, thus why I decided to join the financial services industry in 2022.

I strive to build a trustworthy and honourable relationship with my clients, to give the best suitable solution and realistic financial advice. We invest so much time into our work and need to make sure we retire well, maintain a good quality sustainable lifestyle and also leave a legacy to our children.

In support of my childhood goal, to know as much about anything and everything, I continue to attend Continuous Professional Development courses (CPD) whenever one becomes available. Knowledge is power and therefore I continue to keep up to date with the latest changes in legislation, taxation, products, practices and industry news. I strive to continuously improve my skills and knowledge in all aspects relating to the services and products that I advise on, ensuring that I offer the very best financial solutions to my clients.

I focus on creating and implementing a financial solution that is best suited for each individual, based on their current financial needs and goals. I strive to provide my clients with the tools and advice required to assist them in reaching their financial goals, allowing their idea of financial freedom to become a reality.

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"

Along with attooh!, I believe that success is based on the fundamental principal of adding value to the life of my client, which is why I am passionate about guiding you through your financial journey, helping you to achieve your financial potential and ensuring that you reach your future financial success.

*"Financial freedom is available to those who learn about it and work for it"* – Robert Kiyosaki (Rich Dad Poor Dad)

*Wian Botha*

Financial Advisor



## CONTACT

### Website

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### Mobile // Office Number

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### Physical Address

6 Coen Brits Street Secunda, 2302



## QUALIFICATIONS

Class of Business | *Long Term & Short Term insurance*

Business Management | *Diploma*

Bcom Marketing Management | *(Still to Complete)*



## BUSINESS EXPERIENCE

Sales Representative |  
2022-03-01 - 2023-12-31

KFS Group | *General Manager* |  
2013- - 2020

Coca-Cola Shanduka Beverages |  
*Sales Manager* | 2011- 2013

Coca - Cola Shanduka Beverages |  
*Sales Representative* | 2004- 2011



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



### PERSONAL BANKING



### WILLS & ESTATES



### HEALTH

- Medical aid
- Gap cover



### INVESTMENTS

- Local, guaranteed and offshore
- Retirement investments



### SHORT TERM INSURANCE

- Personal lines
- Commercial insurance



### 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".