

ASHLEY PAULIS

Financial Advisor

Ashley Paulis is a trusted financial planner partnered with the attooh! Group, a division of Discovery Limited. Specializing in comprehensive, holistic financial planning, Ashley ensures that all aspects of his clients' financial lives are thoughtfully addressed, from wealth management to retirement planning, risk mitigation, and legacy strategies.

Having experienced the personal impact of financial missteps firsthand, Ashley is deeply committed to helping clients secure peace of mind, regardless of life's uncertainties. His passion for financial planning was ignited by the untimely deaths of his mother's husband and his uncle, both of which underscored the importance of proactive, thoughtful financial preparation.

With a decade of experience in the financial services industry, Ashley brings a wealth of knowledge to his role, focusing on understanding each client's unique goals and challenges. He believes that financial planning is more than just a service; it's a partnership built on trust, integrity, and a shared vision for a secure future. Ashley's approach is centred around clear communication, creating personalized roadmaps to guide clients toward their financial objectives, while supporting them through life's various stages.

Ashley is committed to making financial planning more accessible and meaningful for his clients, helping them navigate both the expected and the unforeseen with confidence and security.

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CONTACT

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QUALIFICATIONS

RE5, NQF5 Wealth Management



BUSINESS EXPERIENCE

11 years in the industry



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".