

# CHARLES GRANT

## Financial Advisor

Charles Grant believes your financial future deserves more than products and paperwork it deserves genuine care, trusted guidance, and an advisor who is present when it matters most. With more than 21 years of experience in financial services, Charles has built his reputation on long-term relationships, personal service, and helping clients feel secure, informed, and supported through every stage of life.

As a financial advisor with Attooh, Charles works with private individuals and business owners who value professional advice delivered with empathy and integrity. He specialises in estate planning, wills and testaments, investments, Vitality solutions, and Discovery Bank guidance, helping clients protect their families, grow their wealth, and make confident financial decisions.

What sets Charles apart is his belief that financial advice should always begin with listening. He believes an advisor should talk less and listen more during the first appointment, ensuring that every recommendation is built around the client's true needs, goals, and concerns. This thoughtful, client-first approach has enabled him to build trusted relationships that often span generations.

Clients appreciate that Charles is hands-on and personally involved. He takes pride in meeting clients face-to-face and being available when they need support most especially during claims, illness, hospital stays, or the loss of a loved one. For Charles, true advice means being there in life's most vulnerable moments, offering reassurance and practical help when it matters most. He believes clients still want to be known by their first name and treated as people, not policy numbers.

Originally from Vryheid in Northern Natal, Charles brings small-town values of loyalty, warmth, and personal connection into every professional relationship. His passion for people is also reflected in his background as an extrovert who has been actively involved in choirs, where teamwork, discipline, and uplifting others are central values.

Throughout his career, Charles has been recognised for his dedication and service, including a VIP recognition trip to New York City in 2016 organised by Liberty Life. This acknowledgement reflects his commitment to excellence and consistent service to clients.

Charles holds RE and NQF 5 qualifications and continues to focus on delivering trusted financial planning solutions with professionalism and heart.

Outside of work, he believes that a healthy body supports a healthy mindset. Maintaining balance between faith, work, and personal relationships is a core principle that keeps him motivated, positive, and energised to serve others.

If you are looking for a financial advisor who combines experience, compassion, and practical expertise, Charles Grant offers the trusted partnership and peace of mind you deserve.

*Charles Grant*

Financial Advisor



## CONTACT

### Website

[www.charlesgrant.co.za](http://www.charlesgrant.co.za)

### Email Address

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## QUALIFICATIONS

NQF 5



## BUSINESS EXPERIENCE

*Liberty Group | Financial Advisor |  
2005 - 2022*



# 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



### 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 BENEFITS

- Group Risk
- Retirement Funds
- Group Health Solution

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".