

DALE CORNELSON

Financial Advisor

I am a financial adviser with over eleven years of experience helping individuals, families, and business owners make confident and informed financial decisions. My approach to financial planning is holistic and intentional, focusing not only on products or returns but on creating stability, protecting what matters most, and supporting the lives people want to live with clarity and purpose.

My work covers life and disability insurance, investment and retirement planning, tax efficient structuring, estate planning, offshore solutions, and short term insurance for both personal and commercial needs. I believe these elements should function as one integrated strategy rather than separate decisions, ensuring that each part of a client's plan supports the other and remains aligned as circumstances change over time.

Education and transparency are central to how I work. I take time to explain complex financial concepts in clear, practical language so clients understand not only what we are doing, but why it matters. I believe advice should guide and empower, not create fear or pressure. Sustainable outcomes are built through understanding, discipline, and consistency, rather than emotional reactions or decisions driven by short term market movements.

I place strong emphasis on value over price. While cost is always relevant, it should never be the sole driver of a financial decision. I encourage clients to look beyond premiums and headline returns and consider the quality of cover, contractual certainty, tax efficiency, and long term sustainability of their structures. My recommendations are based on careful analysis, professional responsibility, and a clear duty to act in my clients' best interests at all times.

In recent years, I have placed increasing focus on behavioural coaching, recognising that mindset and decision making play a critical role in financial outcomes. I work closely with clients to build confidence, establish sound financial habits, and maintain perspective during periods of uncertainty or volatility, helping them remain aligned to their long term goals.

Above all, I value long term relationships built on trust, integrity, and consistency. I do not see myself as a transactional adviser, but as a long term partner in my clients' financial journey. My goal is to enhance lives, support generational planning, and help people create lasting financial security, so they can focus on living well and creating meaningful memories with those they care about most. This philosophy shapes every recommendation I make and defines how I measure success in my professional practice daily consistently

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CONTACT

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QUALIFICATIONS

NQF 5 | *Milpark* | 2012

RE 5 | *Moonstone* | 2012



BUSINESS EXPERIENCE

Discovery | *attooh!* | 7 years 4 months current

Nedbank | 10 months

Old Mutual | 3 years 7 months



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".