

DAVID HOLMES

Financial Advisor

David looks after the needs of investors wanting to explore both local and offshore structures, markets and investment opportunities. Over the years, he has earned a reputation for being a highly competent and sought-after investment specialist, with a unique ability to truly understand his client's financial objectives.

With his Financial Qualification from Milpark Business School and over 19 years as a top Advisor and Wealth Manager, David can offer his clients a wealth of insight and advice into financial planning and investment solutions. David grew up in the Western Cape and travelled extensively across the Middle East and Europe from 2002 to 2005. His diverse upbringing and extensive qualifications allow him to offer real insight into, not only his clients aspirations but also their business needs and livelihood.

David makes use of sound financial planning strategies to deliver above average returns for his clients and aims to eliminate "the noise" and create holistic financial plans and investment strategies that work together, so his clients get the benefits of an integrated personalized solution.

My role is to help you achieve your goals by guiding you and providing robust independent financial and investment advice. I understand how hard you've worked for your money, and therefore the need to keep it safe and growing.

As an experienced adviser, I understand the importance of wealth and believe that no one is better placed to help you grow your wealth, protect it and preserve it. Through partnerships with industry leaders in the fields of foreign exchange, tax, international property, offshore bank accounts, trusts, wills and estate planning, I am able to cater to your offshore and local investment needs by providing you with access to the highest levels of service for your financial planning requirements.

As your Financial Advisor & Wealth Manager, I remain impartial and ensure my client's needs are exceeded throughout. There is no fee or charge for a consultation, just a cup of coffee and an open, frank discussion.

David Holmes
Financial Advisor



CONTACT

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 David Holmes



QUALIFICATIONS

Advanced Certificate in Financial Planning.

Milpark Business School.



BUSINESS EXPERIENCE

Liberty, Sales Manager 2006 -2019

Carrick Wealth, Offshore Wealth Manager, 2020 - 2023



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".