

FRANCIS BOERSMA

Financial Advisor

For many people, financial planning is about far more than investments and insurance policies it is about protecting their families, securing their future, and working with someone they can genuinely trust. That is the philosophy that has guided me throughout my 27-year career in the financial services industry.

As a Financial Advisor at attooh! Holdings, I am passionate about creating a safe and supportive environment where clients feel comfortable discussing their financial concerns, aspirations, and long-term goals. My approach is centred on listening first, understanding each client's unique circumstances, and then providing honest, practical advice tailored to their needs.

I specialise in wealth management, retirement planning, estate planning, investment planning, insurance solutions, offshore investing, medical aid, and employee benefits for smaller businesses. I work with a diverse range of clients, including high-net-worth individuals, young families, professionals, retirees, and business owners. One of my key focus areas is assisting smaller businesses particularly those with fewer than 200 employees gain access to quality employee benefit and business insurance solutions often reserved for larger corporate organisations.

Holding an NQF 5 qualification in Wealth Management, I combine decades of industry knowledge with a deeply personal understanding of the importance of ethical and client-focused financial advice. Early in my own professional journey, I experienced firsthand what it felt like to place trust in financial advice that did not fully serve my best interest. Rather than allowing that experience to discourage me, it became the driving force behind my commitment to becoming the kind of advisor clients can rely on with confidence and peace of mind.

Today, I believe that strong financial advice is built on integrity, trust, transparency, and long-term relationships. I take pride in helping clients navigate important life decisions with clarity and confidence while ensuring they feel supported every step of the way.

Beyond my professional role, I am a proud mother of two sons, a mother-in-law, and a devoted grandmother. Family remains one of my greatest motivations and continues to inspire my commitment to being the best possible version of myself both personally and professionally. I also embrace an active and healthy lifestyle and believe in leading by example for both my family and clients.

Whether clients are planning for retirement, building wealth, protecting their loved ones through insurance, or preparing a lasting estate plan, I am dedicated to helping them create financial security and lasting peace of mind through trusted, personalised advice.

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CONTACT

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QUALIFICATIONS

Wealth Management NQF 5



BUSINESS EXPERIENCE

Discovery Holdings, Financial Advisor | 2012 - 2020

attooh! Group, Financial Advisor | current



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".