

GERALD SPIES

Financial Advisor & Branch Director

I am a Financial advisor and proud member of the attooh! Group of Companies, an award winning, Financial Advisor Group with a national footprint. At attooh! we specialise in a full spectrum of corporate and individual financial services. We are passionate about providing clients with tailor-made financial plans, personalised financial education packages, as well as forming lifelong bonds.

I relate to the company icon, the butterfly, as I believe in a metamorphosis of dynamic change and improvement. I believe in helping my clients achieve this transition. This goes hand-in-hand with our company motto: "We make ordinary people Millionaires and make Millionaires Financially Independent". With my qualifications, experience and an incredible support staff, I am confident that I can guide my clients to become financially independent Millionaires by implementing holistic, personalised plans to achieve their financial goals and freedom.

I have a wealth of experience in the Financial Advisory field and have been in the industry since 1997, working for many prestigious companies such as Standard Bank & Adviceworx. I believe that knowledge is an important part of my evolution and continue to expand it by attending regular training seminars, staying abreast of the changes in the industry and being inquisitive of what is going on around me. I obtained my NQF LVL 6 qualification in 2011 and I also have a certificate in wealth management.

It is important to me that I add constant value to my clients and their businesses, so I stay up-to-date on legislation, taxation, products, practices and industry news. My association with the Discovery Group means I can offer my clients the best financial solutions from a dynamic product range, as well as the benefits of the innovative Discovery rewards programme. I don't believe in merely selling products to my clients, but rather focus on creating and implementing a financial plan best suited to them, based on their financial needs and wants.

These tailor-made packages, as well as my personalised service, help my clients to make their financial dreams a reality. I strive to add value to both their experience and their lives, as we move through the evolution of their financial status. In this uncertain economic climate, it is important for me to maintain a hands-on approach, to ensure that I protect my clients and their businesses from expected and unexpected changes. With attooh! by my side, I look forward to guiding my clients on their own financial metamorphosis to achieve their full potential and financial success.

A quote I live by is, "Be inspired by the fear of being average." - Unknown



CONTACT

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QUALIFICATIONS

NQF LVL 6 | *University of Stellenbosch
Business School, 2011*



BUSINESS EXPERIENCE

Standard Bank | 2003 - 2013

DFC | 2013 - 2016

Adviceworx | 2016 - 2017



Discovery



DOES YOUR MONEY NEED A "PROFESSIONAL TRAINER"?

Financial planning is more than just numbers on a piece of paper. It's about your life – and what you want out of it. Do you understand where you are? Do you know what your financial goal is? How about the security of your family's future? Financial planning connects life with finance and evaluates the assets needed to help make a dream come true. We use financial tools to help us learn about your goals to offer guidance for every step of your journey in this unpredictable life.

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



PERSONAL BANKING



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



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".