

JACO MOSTERT FSA™

Financial Advisor

Your financial journey, guided by experience and integrity

Financial planning isn't about products, it's about you. With nearly two decades in financial services, Jaco Mostert, Financial Advisor and Wealth Creation Specialist, helps clients chart a smarter course toward long-term goals, protection and legacy.

Inspired by a longstanding desire to help people, Jaco sees financial planning as the ultimate roadmap to lasting impact. Over the course of his career, he has honed his craft independently, aligning clients' aspirations with tailored solutions across investment planning, wealth management, retirement and estate planning, tax optimisation, risk cover (life & disability), business assurance, and succession strategies.

Based in Pretoria, Jaco works independently in partnership with investment houses such as Allan Gray, Coronation and NinetyOne, ensuring clients benefit from unbiased, top-tier solutions. His hallmark lies in personal consultations, long-term strategy building, and regular progress reviews, always crafted around your life and goals.

Working with Jaco means:

- A truly bespoke plan, not a one-size-fits-all product
- A relationship built on trust, clarity, realism and humility
- A focus on the serious and committed, those passionate about their financial future

Qualifications & Recognition

Jaco holds a BCom degree from the University of Pretoria and a post-graduate qualification in Financial Planning from the University of the Free State. Known for his commitment to excellence, he was recognised as a Laurence Advisor at BrightRock, reflecting his steadfast dedication to clients and ethical standards (blog.workerslife.co.za).

More than numbers

True to his holistic approach, Jaco regularly draws inspiration from cricket and classical music, finding parallels between strategy, rhythm and long-term discipline, both on the field and in financial planning.

What truly sets Jaco apart

- A wealth of experience and disciplined mindset, grounded in clients' real lives
- An independent status that ensures unbiased advice aligned with your best interests
- A long-term partnership model built on regular reviews and open communication

With Jaco as your personal financial coach, every decision is a step toward clarity and confidence. Together, you'll simplify complexity, craft a plan that works, and build a future you deserve, over time, thoughtfully and deliberately.

 **Jaco Mostert** FSA™
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CONTACT

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QUALIFICATIONS

B.com | *University of Pretoria*

Post Grad Financial Planning |
University of the Free State



BUSINESS EXPERIENCE

Time in Financial Industry:
14 Years



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".