

PETER PATEL

Financial Advisor

Peter J. Patel – Senior Financial Services Executive

Peter J. Patel is an accomplished financial services leader with over 30 years of experience across banking, insurance, wealth management, and corporate advisory. Based in Cape Town, South Africa, he has held senior roles in leading institutions including Nedbank, Standard Bank, and ZAR Financial Engineering, consistently driving growth, compliance excellence, and client success.

Currently serving as a Financial Advisor at Attooh Financial Services, a representative of Discovery Life Ltd. Peter provides strategic private wealth management, estate planning, mortgage lending and insurance solutions to a diverse portfolio of individual and business clients. He is recognized for his ability to mentor consultants, build long-term client relationships, and deliver tailored financial strategies that balance immediate needs with future legacy planning.

Peter's career highlights include managing multi-billion rand investment portfolios at Nedbank, where he earned national recognition as the Bank's South Africans Best Investment Portfolio Manager in 2011. His leadership extends to executive positions such as Managing Director of Financial Care Consulting and Jodar Management Consultants, where he advised individuals on Financial Planning and SMEs on cashflow optimization, aligning treasury, compliance, and stakeholder engagement strategies. Outside of the Financial Services Industry, Peter also spent a few years in Canada managing a Sales and Marketing team in the Automotive Manufacturing industry.

Academically, Peter has pursued advanced financial and management training, including studies toward the Chartered Financial Analyst (CFA) designation, a Postgraduate Management Advancement Programme diploma from Wits Business School, and certifications in credit risk, compliance, and project management. He is also licenced with the Financial Sector Conduct Authority of SA as a Key Individual (RE1) and Representative (RE5). His expertise spans credit, risk, and regulatory frameworks, complemented by strong negotiation, organizational, and people management skills.

Known as a strategic thinker and diplomatic negotiator, Peter thrives in high-pressure environments and is driven by a passion for delivering solutions that achieve measurable results. His professional ethos is anchored in integrity, client-centricity, and a commitment to mentoring the next generation of financial professionals. Outside of work, Peter enjoys spending time and winds down with his family over weekends, traveling, outdoors activities such as camping, reading, and tinkering with auto mechanics as a hobby—interests that reflect his curiosity, discipline, and appreciation for both detail and the bigger picture.

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CONTACT

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Peter Patel



QUALIFICATIONS

Witwatersrand University MAP
Diploma



BUSINESS EXPERIENCE

ZAR Financial Engineering
Senior Financial Advisor | 2020–2026

Financial Care Consulting
Managing Director | 2024

Jodar Management Consultants
Managing Director | 2018–2025

Standard Bank
Account Executive | 2016–2018



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".