

# PIETER DU PLESSIS

*Financial Advisor*

For business owners, entrepreneurs, and medical professionals, financial planning is about far more than products and policies; it is about building a secure future, protecting what matters most, and creating long-term financial confidence. Pieter du Plessis understands that every client's journey is unique, which is why he focuses on delivering clear, strategic, and personalised financial advice that aligns with both personal and business goals.

As an Executive Financial Advisor at attooh!, Pieter specialises in business life insurance, tax-efficient life and retirement planning, and pension optimisation. With six years of experience in the financial services industry, he has developed a reputation for simplifying complex financial strategies into practical, understandable solutions that empower clients to make informed decisions with confidence.

Pieter works primarily with business owners, young entrepreneurs, and medical professionals who require more than generic financial advice. His approach is relationship-focused, analytical, and highly personalised, ensuring that each recommendation is based on a client's unique circumstances, long-term objectives, and risk profile. By combining holistic financial planning with a data-driven mindset, he helps clients structure effective protection and retirement strategies that support sustainable growth and financial security.

Before joining attooh!, Pieter built valuable industry experience as a Short-Term and Personal Business Insurance Advisor, as well as an Alternative Distribution Consultant at Discovery Ltd. These roles provided him with a strong technical foundation in insurance, risk management, and client engagement, which continues to shape the practical and transparent advice he provides today.

What truly differentiates Pieter is his commitment to honest, no-nonsense financial advice. He believes clients should clearly understand not only the cover they need, but also what they do not need. His philosophy is rooted in transparency, trust, and accountability, ensuring every recommendation serves a real purpose within a client's broader financial strategy.

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Financial Advisor



## CONTACT

**Website**

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## QUALIFICATIONS

NQF 5 in Wealth Management

Bcom Information Systems in  
Progress from Unisa



## BUSINESS EXPERIENCE

Propulsio Brokerworx, Financial  
Advisor | 2022 - 2023

Discovery Limited, Business  
Consultant | 2023 - 2024

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".