

RICUS VENTER

Financial Advisor

I am a Branch Director and Financial Advisor affiliated with the attooh! Group of Companies, which delivers holistic, tailor-made and diversified financial planning solutions to individuals and companies on a national scale, including Offshore Financial solutions, Employer Benefit solutions and Short Term Insurance solutions (Personal and Business). I also offer business assurance risk solutions such as buy and sell arrangements, key person cover and contingent liability cover.

The combination of my personal background, experience and qualifications enable me to provide you with expert financial advice and Intermediary Services. My objective is to guide you through your financial journey and to add considerable value to you and your family's financial wellness. With the assistance of my proficient team of support staff, I am able to assist you in implementing a holistic plan to achieve your financial goals. I have been in the financial services industry since 2010. In this time I have held various roles at Discovery including Franchise Director since 2014. I hold BCom and BCom Hons degree's and completed my Regulatory Exams (RE1 and 5). I continue to attend Continuous Professional Development courses (CPD). In support of my belief that knowledge is power, I continue to keep up to date with the latest changes in legislation, taxation, products, practices and industry news.

I strive to continuously improve my skills and knowledge in all aspects relating to the services and products that I advise on, ensuring that I offer the very best financial solutions to my clients. My affiliation with the Discovery Group allows my clients to continually receive the personalised solutions they need, as well as to reap the rewards of being a Discovery client, benefitting from Discovery's dynamic product range and innovative rewards structure. I understand that in this volatile economic environment, it is important to stay focused, knowledgeable, and goal-orientated within every aspect of my client's financial portfolio.

My objective is to guide you, my client, to financial success by protecting you and your family, your business and employees, from expected and unexpected life events. I strive to add value, not only to your financial portfolio, but in every aspect of your journey towards financial freedom. Along with attooh!, I believe that success is based on the "fundamental principle" of adding value to the life of my client, which is why I am passionate about guiding you through your financial journey, helping you to achieve your financial potential and ensuring that you reach your future financial success.

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CONTACT

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QUALIFICATIONS

BCom Industrial Psychology |
University of Johannesburg. 1997

BCom Hons Strategic Management |
University of Johannesburg. 1999



BUSINESS EXPERIENCE

Business Manager | *CHEP, 2000 - 2004*

Managing Director | *Brainwave Careers. 2004 - 2010*

Business Consultant | *Discovery Consulting Services. 2010 - 2014*

Franchise Director | *Discovery Consulting Services. 2014 - June 2020*

Branch Director and Financial Advisor | *attooh! - 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



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".