

# STEFAN DE BRUIN

Financial Advisor

When it comes to protecting your business, your family, and your long-term financial future, working with an advisor who understands the realities of modern business ownership can make all the difference. Stefan de Bruin is committed to helping business owners and professionals make confident financial decisions through practical, personalised advice that is designed around real life not generic, one-size-fits-all solutions.

With 7 years of experience in the financial services industry, Stefan specialises in Business Insurance and Wealth Planning, helping clients create financial structures that protect what matters most while building long-term security for future generations. His approach is grounded in family values and meaningful relationships, with a strong focus on understanding each client's personal and business circumstances before recommending tailored strategies.

Stefan believes that financial planning should be clear, practical, and aligned with a client's goals and responsibilities. Whether assisting business owners with key person insurance, business assurance, succession planning, or helping professionals build and preserve wealth, he focuses on delivering advice that is both relevant and actionable. His philosophy is simple: financial planning should make sense, add value, and provide peace of mind.

Holding a Financial Planning Degree (NQF Level 7), Stefan combines professional expertise with hands-on industry experience gained through respected financial institutions including BrightRock and Discovery. These experiences have equipped him with a broad understanding of risk management, wealth creation, and the financial challenges faced by South African business owners and professionals.

Clients appreciate Stefan's professional yet approachable manner, as well as his ability to simplify complex financial concepts into strategies that are easy to understand and implement. He is passionate about building long-term relationships with clients and takes pride in being a trusted advisor throughout every stage of their financial journey.

Outside of the financial planning environment, Stefan enjoys spending time on the golf course, which reflects his appreciation for discipline, strategy, and meaningful personal connections qualities that also shape the way he works with his clients.

For individuals and business owners seeking trusted guidance in business insurance, wealth planning, and long-term financial security, Stefan offers a professional and client-focused approach built on trust, practicality, and lasting value.

*Stefan de Bruin*  
Financial Advisor



## CONTACT

### Website

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### Physical Address

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0081



## QUALIFICATIONS

NQF7 & RE5



## BUSINESS EXPERIENCE

Capital Legacy, Financial Advisor |  
2019 - 2021

Brightrock, Business consultant |  
2022 - 2023

Discovery, Business consultant |  
2024 - 2025

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".