

GERRIT SMITH

*Branch Director / Financial Advisor &
Co-author of The Ordinary Millionaire*

Gerrit Smith is a Financial advisor affiliated with attooh! specialising in Corporate Employee Benefits and Pre- and Post-Retirement planning. He provides Holistic services which also include: Life and Disability Assurance; Risk Planning; Healthcare Planning; Short term Insurance; Wellness and Vitality benefits; Tax Advice; Estate Planning Services."

"Fail to Plan; Plan to Fail"

The foundation on which I have built my career as a Professional Rugby Player and Financial Planner. Gerrit's professional career began as a Professional Rugby Player with limited financial support. Gerrit's determination to fulfill his childhood passion and open doors of opportunity for endorsed academic opportunities was underpinned by the need for both life and financial planning. Succeeding on the rugby field and as a financial advisor has forged a unique perspective for Gerrit on financial wellness and enjoying the fruits of success against the odds.

Growing up with a single parent, I had a simple decision to make, either I move into the corporate world, or become a professional athlete. I decided to hedge my bets and pursue both. Hard work on the rugby field eventually paid off and opened educational opportunities in the form of sport bursaries.

Gerrit obtained a Bachelor of Commerce from the Nelson Mandela University in 2013 and thereafter quickly established his passion financial planning which resulted in the achievement of being a Golden Key Candidate on Postgraduate level: Postgraduate Diploma in Financial Planning Law.

Gerrit formally retired from his Professional Rugby Career in 2015 to dedicate full attention and energy on his Financial Advisory career. Gerrit is deeply empathetic of the repercussions of poor financial literacy, awareness and planning having come from a home where independent retirement is unattainable - an echo of the 94% of South Africa's population which are unable to retire independently. Gerrit's passion to help others reach optimum financial wellness and to support their lives and families through smart and effective planning has deep roots extending back to childhood.

The combination of Gerrit's personal background, experience and qualifications has enabled him to provide expert financial advice. Gerrit, along with his proficient team of support staff, can assist with the implementation of a comprehensive personal plan to achieve financial goals, acquire valuable knowledge, and successfully walk the journey to financial wellness through dedicated support and guidance.

Gerrit has been in the financial industry for close to a decade and in this time has held various roles at some of the most prominent Insurance and Boutique Asset Management Companies in South Africa and hold the prestigious Certified Financial Planner (CFP) Qualification.

"I do not merely sell products to my clients; I create and implement a financial solution that is best suited to them based on their current financial needs and wants. I provide them with the tools that they require to place them in a better position than what they were in before, so that the idea of reaching their financial goals becomes a reality"



CONTACT

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QUALIFICATIONS

Postgraduate Diploma in Financial
Planning Law | Nelson Mandela
University | 2014

Bachelor of Commerce: Financial
Planning | Nelson Mandela
University | 2013

IRB LEVEL 1 Coaching Blue Bulls
Rugby Academy | 2010



BUSINESS EXPERIENCE

Dolberg Group | 2013 - 2015
Warwick Wealth | 2015 - 2017
Advicworx | 2017 - 2019
attooh! | 2019 to date



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Gerrit understands that in this volatile economic environment, it is important to stay focused, knowledgeable, and goal-orientated within every aspect of your financial portfolio. His objective is to guide clients to financial success by protecting their dependants, businesses and employees from unexpected life events, adding value to their journey to financial freedom.

Gerrit's pursuit to offer the best, and most relevant, services and his advice is underpinned by continual upskilling and knowledge acquisition to remain at the top of his industry. ***Client's are alleviated from the burden of staying abreast the constantly evolving financial landscape, including latest products, services and legislation.*** Clients will reap the rewards of expert advice and knowledge on a dynamic product range and innovative reward structure making the pursuit of financial wellness a well-informed, guided and easier process. In association with the attooh! Group of Companies, Gerrit looks forward to assisting clients achieve their financial potential and future financial success!

CO-AUTHOR OF THE #1 AMAZON BEST SELLER



The Ordinary Millionaire book achieved the number 1 Best Seller status. The purpose of the book is to help and educate you, and to guide you along with the secret steps to take on your journey to financial independence.

The aim is to help you get to that "Ordinary Millionaire" status and more importantly, to enjoy life as one of the few who cracked the secret to Financial Independence and the state "Wealthy, Healthy, and Happy." Make sure you visit my website to download a copy of The Ordinary Millionaire.

I am a co-author of The Ordinary Millionaire book. Visit my website and download my FREE Book.

If someone asks you, "Are you a millionaire?" your immediate response would probably be NO if you don't have millions in the bank, right?

We always think that there should be "more to life" and that MONEY would buy us happiness. But, what if someone asks you whether you would trade your family, friends, partner, or your skillset for a million Rand in cash, hmmm then your answer would probably be NO too, right?

The Ordinary Millionaire is attooh!'s financial educational drive. It is based on the fact that YOU ARE indeed a millionaire already. The people you love and the moments of deep, authentic wellness - goes way beyond a life of worldly riches. Your MOMENTS, your happiness, that makes you a millionaire.

The ordinary millionaire is you. It's me. It's when we realise that the millionaire-moments and magic of life is in everything that surrounds us...

Once you have bred your internal millionaire mindset, when you start working with what you have rather than resenting what you don't, you pave a way of true purpose. And then... it's just a simple formula, a proven recipe, strategy, and commitment that will set you on a journey to complement your millionaire mindset with an external, monetary one.

Every single person has the opportunity to become a millionaire. We feel everyone should have the know-how and the knowledge to do so. The Ordinary Millionaire is an initiative inspired and developed by financial experts that want to equip you.



DOES YOUR MONEY NEED A “PROFESSIONAL TRAINER”?

Financial planning is more than just numbers on a piece of paper. It's about your life – and what you want out of it. Do you understand where you are? Do you know what your financial goal is? How about the security of your family's future? Financial planning connects life with finance and evaluates the assets needed to help make a dream come true. We use financial tools to help us learn about your goals to offer guidance for every step of your journey in this unpredictable life.

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



PERSONAL BANKING



HEALTH

- Medical aid
- Gap cover



INVESTMENTS

- Local, guaranteed and offshore
- Retirement investments



SHORT TERM INSURANCE

- Personal lines
- Commercial lines



FIDUCIARY

- Wills and Estate
- Trusts



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".