ABOUT **ME**

Ian is a focused, driven and determined Financial Expert who offers a range of financial services to professionals, business owners, corporate companies and individuals. These services include that of Risk planning, Investment Planning and Savings, Healthcare Planning, Life and Disability Assurance, and Pre-retirement Planning, amongst other specialties.

Ian prides himself on being a highly professional and ethical Financial Planner, who values excellence in every area of his life. In addition to being both professionally and personally goal-orientated, Ian sets high standards for himself and for those around him, as he gives and expects only the best. As a persistent and disciplined individual, Ian always works with a sense of urgency and with the goal of over-delivering on all his promises.

I see financial planning as a tool that should be accessible to everyone. By making sense of all the jargon and financial complexities, I allow my clients to focus on that which they do best – producing their bottom Line. I see the broader picture in all my clients' portfolios, and is driven towards the goal of establishing my clients' financial security and prosperity.

I believe financial planners should be knowledgeable and competent in their profession in order to assist the client, with honesty and integrity. In providing my clients with the advice and expertise they need, I ensure that they have peace of mind, thereby eliminating the stress of having to worry about their financial future. Ian prides himself on walking a journey with all his clients in the management of their portfolios, as they partner in the creation of a flourishing wealth

I apply a needs-analysis process to determine the client's financial goals and ensure that the goal is meaningful in the context of the individual's situation. I then subject these goals to a reality check in other words considering the individual's current and future resources available to achieving their goals.

Ian has won several Momentum sales awards and has qualified for numerous Momentum conventions. He received the International Quality Award (LIMRA) in 2008, 2009, 2010, 2011, 2012 and 2013

EDUCATION

FSB | *Regulatory Examination*
PSG | *Advanced Certificate in Financial Planning*
UFS | *Post Graduate Diploma in Financial Planning (Completing)*

BUSINESS EXPERIENCE

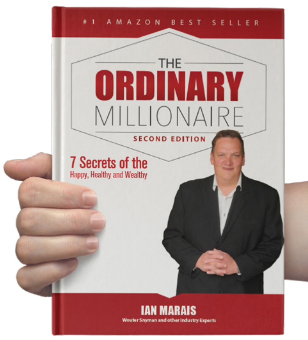
Liberty | *Financial Advisor, 2002 -2007*
Momentum | *Financial Advisor, 2007 - 2014*

MY BOOK #1 AMAZON BEST SELLER

My book 'The Ordinary Millionaire" achieved the number 1 Best Seller status. The purpose of my 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.



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ABOUT ATTOOH!

As a Boutique firm we specialise in value-added solutions that incorporates the financial advisory process with a focus on dedicated and tailor-made client education packages. We cover the full spectrum of financial services products and each client's ability to interact with us from cradle to grave.

Corporate dinosaurs boast about the number of years they have been around and the number of clients that they have on their books. What matters most is an intimate entrepreneurial approach, in partnership with clients, to provide them with tailor-made service solutions and offerings that they appreciate, understand and value.

At attooh! we have a corporate view with an individual focus. Our Core Purpose is to empower individuals, at all levels of the economic spectrum, with solutions - not just products.

CORE SERVICES

RISK PLANNING

- Life cover.
- Disability Protection.
- Dread Disease cover.
- Physical and Functional impairment.
- Income Protection.
- Death / Disability Premium waiver.
- Funeral Cover.

HEALTHCARE PLANNING

- Medical aid cover.
- From hospital plans to comprehensive medical aid.
- Gap cover and Health Plan protector .
- Vitality and Multiply status support via our wellness company, active8tor.

INVESTMENT PLANNING

- Flexible investments (no term)
- Unit trusts
- Endowments (5 or 10 year plans)

RETIREMENT PLANNING

- Retirement Annuities.
- Pension / Provident Preservation plans.
- Living annuities, Fixed interest Annuities and Income plans.

ADDITIONAL SERVICES

EDUCATION

- Education Protectors and Savings plans.
- "The Ordinary Millionaire" is a set of financial literacy training programs that focus on providing education, guidance and coaching that empowers individuals to take control of their financial situation.

EMPLOYEE BENEFITS

- Group Risk Benefits.
- Pension and Provident fund Consulting.
- Specialist representatives Nationwide
- A dedicated Fund Consultant and administrative person will be allocated to your company.

BUSINESS PLANNING

- Buy & Sell arrangements.
- Key person cover.
- Contingent liability.
- Loan account, overdraft, surety insurance and business overheads protector.

SHORT-TERM INSURANCE

- **Personal lines:**
  Home owners.
  House hold and vehicle insurance.
- **Commercial:**
  Cover for businesses.

ESTATE PLANNING

- Wills.
- Trusts.
- Executor services for winding up deceased estates.
- Protection Plans to protect your Estate against Excecutor, Conveyance and Trustee fees.

ASSET CONSULTING

- Assist retirement fund members to achieve better outcomes at retirement.
- Retirement fund investment strategy development, adoption and implementation.
- Board and member investment education and communication.