

MARK WENTZEL

CERTIFIED FINANCIAL PLANNER® & Co-author of The Ordinary Millionaire

THE
ORDINARY
MILLIONAIRE

ABOUT ME

I am happily married and we have a son that recently finished school. We have strong family values and know that love, honesty & respect goes a long way in achieving happiness and success in life.

Further to this I am a very social person. I have a passion for people and believe in having strong relationships. For entertainment I enjoy watching sport, listening to music, catching a good movie every now and then and last but not least wining & dining – good food and good company! Occasionally I get it right to make time for some me time too, I spend this time going for a ride on my motor bike or enjoying a relaxing game of golf.

Having a passion for people and being interested in people's financial welfare obviously led me to this career in Financial Planning. I started my career in the financial services industry in the banking sector in 1991. After 5 years I resigned as Managers Clerk at that stage over seeing all personal and commercial lending, securities and foreign exchange. I then furthered my career in the insurance sector. I was appointed as a financial advisor at Old Mutual. Here I gained valuable training and experience in various fields including Estate Planning, Investment Planning, Short Term- and health insurance. I decided to become an independent broker in the year 2000.

As I believe in Continuous Professional Development I then studied towards a higher qualification. I completed my Post Graduate Diploma in Financial Planning in 2003 and my Advanced Post Graduate Diploma in Financial Planning (Estate Planning) in 2007. I have also been a member of the Financial Planning Institute since 2002 and qualified as a Certified Financial Planner in 2004.

Working with self-employed professionals and high net worth business owners has helped me to follow a holistic approach when it comes to financial planning for my clients. Performing a Full Financial Needs

Analysis and following the 6 Step Financial Planning Process, I advise my clients on all aspects including Estate Planning, Business Succession Planning, Investment- and Retirement Planning. I am also assisted by a great team ensuring professional support and advice in other lines of financial services including Short Term Insurance, Health Insurance, Trust Administration, Employment Benefits and Wellness Management. My passion to do the best for each and every client, providing them with Professional Advice & Quality Service gives my existing clients piece of mind that their financial matters are in good hands. This combined with regular contact will result in long lasting, trustworthy relationships with all our clients going forward.

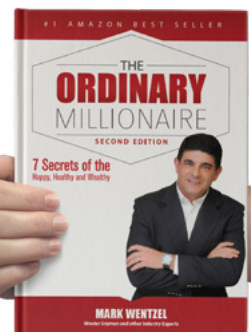
Thanking all my existing clients for their loyal and continuous support!

EDUCATION

Post Graduate Diploma in Financial Planning | Year 2003
Advanced Post Graduate Diploma in Financial Planning
(Estate Planning) | Year 2007

I AM THE CO-AUTHOR OF THE NUMBER 1 AMAZON BEST SELLER BOOK, "THE ORDINARY MILLIONAIRE".

This book is a unique collaboration by a number of financial advisors from the attooh! Group of Companies combining our expertise under the leadership of Wouter Snyman to produce a book packed with financial wisdom that is relevant for every individual wanting to embrace the philosophy's shared and steps highlighted to walk the journey to financial independence.



CONTACT DETAILS

Website

www.markwentzel.co.za

Mobile // Office Number

+27(0) 833079811 // 012 368 9900

Email Address

mark@attooh.co.za

Address

Unit 1B, Menlyn Woods Office Park, 291 Sprite Ave,
Faerie Glen, Pretoria, 0081

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 covers the full spectrum of financial services products and each client's ability to interact with us from cradle to grave.

- » The combined life span of entities that attooh! consists of have been trading for more than 25 years
- » Our workforce collectively has financial services experience spanning more than 400 years
- » Our average corporate clients life time exceeds 10 years

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.

WEALTH SOLUTIONS

INDIVIDUAL FINANCIAL PLANNING

A Risk financial plan will be provided to give you, as valued client, an overview of your financial status.

Part of your plan will include: Untimely Death, Estate Planning, Temporary or Permanent Disability, Income Protection, Severe Illness. An Investment plan will be provided to give you, as valued client, an overview of your financial and investment status.

Part of your plan will include: Pre-Retirement Planning/ Post-Retirement Planning, Investment Planning, Tax Planning.

BUSINESS FINANCIAL PLANNING

We believe that your business is an extension of yourself and we assist in protecting and growing your business. A Business Needs Analysis will ensure that we provide comprehensive advice by supplying you with a plan of action and overview of your the financial status.

Part of your plan will include: Business Excellence Index (BEXI), Buy and Sell Arrangements, Contingent Liability Provision, Keyman Cover, General Power of Attorney, Pension and Provident Provision & Analysis, Group Medical Aid Cover.



FINANCIAL PLANNING

Access to TOP Financial Advisors in South Africa. We offer a complete range of Individual Financial Planning Services and Financial Solutions.



EMPLOYEE BENEFITS

We ensure a healthy, financially secure future for your employees and their families. Our employee benefits solution are designed to protect your company against uncertainties as a result of an employee's death, disability or severe illness.



HEALTHCARE

We are an Independent Health Care Specialist and was rewarded the Nr 1 Healthcare award. We have access to wide ranging benefits, care programmes and services that ensure you can access the best healthcare available when you need it.



SHORT TERM

We handle all Personal & Commercial Short Term contracts protecting you, your family or business against any losses.



INVESTMENT CONSULTING

We offer a holistic asset consulting service that, in partnership with some leading industry specialists, include a wide range of investment solutions.



LEARN LOUNGE

An online learning portal that helps anyone learn business, software, technology and creative skills to achieve personal and professional goals.



ESPRESSOWILL

In partnership with Capital Legacy we assist with Wills and protection against exorbitant deceased estate legal expenses. Helping you protect your loved ones- and get your affairs in order through a simple process.



ESPRESSOTRUST

A trust is an entity that will "outwit, outplay and outlast an individual" and we can use this tool to the benefit of our clients. Our aim is to enable our clients to protect their hard earned assets for generations, as easily as ordering a great espresso. We create liquidity in an estate. We have demystified the daunting issue of trust administration by partnering with Trusteeze.

ASSOCIATED PARTNERS

