

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.

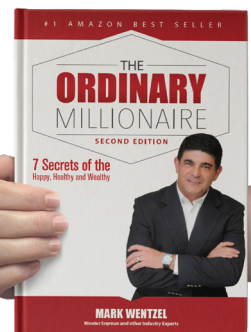
Thanking all my existing clients for their loyal and continuous support!

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

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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 covers 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 Executor, 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.