

CRAIG MCLACHLAN

*Financial Advisor &
Co-author of The Ordinary Millionaire*

"Give a man a fish and you feed him for a day; teach a man to fish and you feed him for a lifetime." - Maimonedes (Spanish philosopher, 1135 - 1204)

A thirst for the knowledge required to create a sound financial portfolio guided me to partner with attooh! Financial Wellness (Pty) Ltd when it was founded in 2013. With the power of attooh!'s unique platform, I can offer you a tailor made approach to your Financial Wellness and Wealth Management needs.

My journey

After sixteen years in the Financial Services industry, I had a wealth of knowledge and a vision of being self-employed and building sustainable businesses based on old-fashioned service combined with cutting-edge products. In 2013. My wife Lyn McLachlan (also a Financial Advisor) and I partnered with attooh! Financial Wellness Sandton. Seizing this opportunity of helping others to reach their financial goals has enabled us to build a meaningful legacy for our loved ones.

About me

Apart from empowering our clients to meet and even exceed their financial goals, we enjoy recruiting and working with dynamic, entrepreneur minded individuals in our team. We are both qualified, passionate and excited to teach business ideas and implement principles through our Financial Services and Wealth Management practise. Both Lyn and I enjoy spending hours building ourselves up, through principles gained from personal growth books and seminars which we attend regularly. Out and about we enjoy socialising, gardening, sports and of course, fly fishing.



CONTACT

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QUALIFICATIONS

FPI | RE5 Industry Standard
Regulatory Exam 2011

Accredited Financial Advisor



BUSINESS EXPERIENCE

Finlogic | Wealth Management
Advisor

Liberty | Financial Advisor

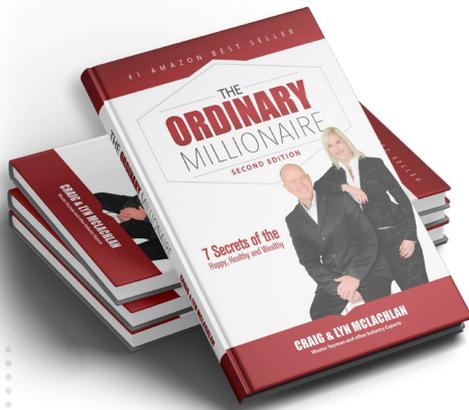


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CO-AUTHOR OF THE #1 AMAZON BEST SELLER



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”.