

LEON BERGH

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

Live better today!

I believe that the financial road begins with honesty and trust, I am committed to treating my clients with the utmost respect and to make sure that they are satisfied with advice and products. He works with the most competent staff, with the necessary skills and best service capabilities, to ensure that his clients receive only the best advice, guidance and service from his office. He has a deep regard for his clients' needs and wants and does his best to ensure that together they design a personalised solution that will best provide his client with a secure financial future."

I strive to continuously improve my skills and knowledge in all aspects relating to the services and products that I advise on to ensure that I offers the very best financial solutions that are seamless and deliver on their promises, enabling every client to reap the rewards of being a Discovery client and benefiting from their dynamic product range and innovative reward structure. I ensure that I enable you to make the correct choices regarding your financial future.

Financial planning is for everyone - it is much more than investing or taking a risk policy, its all about where you are and where are you going, how to get there and what to do next. My purpose is to navigate my clients in all aspects of financial planning advising were to start and giving the correct plan to succeed on whatever goal they wish to accomplish. The perfect combination is where an advisor and client can work together in unison, to achieving your goals and to look at this as a journey and not a race.

We offer a wide range of comprehensive benefits that can give the client financial independence and making sure that all needs are looked after, backing you as client with a competent team that can assist in all areas of business. We work with business professionals, business owners, corporate companies and individual clients, offering expert advice in Life and Disability Assurance, Risk Planning, Investment Savings and Planning, Healthcare planning, Pre- and Post-retirement Planning, Short-term Insurance, Discovery Insure, Corporate Employee benefits, Corporate benefits, Wellness (Vitality), Investment management, Income Tax advice, and Trusts and Wills."



CONTACT

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QUALIFICATIONS

RFP 1 & 2, RE 1 (Rep) & RE 5 (Key
individule)



BUSINESS EXPERIENCE

Discovery DFC - Rivonia, Financial
Advisor | 2007 - 2010

Momentum , Financial Advisor | 2010
- 2014

attooh!, Financial Advisor | 2014 -
current



Discovery



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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".