

# ALEXZIS SPINAZZE

## Financial Advisor

Alexzis Spinazze is a Financial Adviser affiliated with Attooh specialising in Individual and Business Assurance which includes the following:

- Life and Disability Assurance
- Risk Planning
- Investment Planning for Retirement and Wealth Creation
- Healthcare Planning
- Short term Insurance
- Corporate Employee Benefits
- Wellness and Vitality Benefits
- Investment Management

"The combination of my personal background, experience and qualifications enables me to provide expert financial advice, and along with a proficient team of support staff, I am able to assist you in the implementation of a holistic, personal or business plan to achieve your financial goals, providing valuable knowledge and guidance along your journey to financial wellness.

In my years in the industry I have sat face to face with hundreds of clients and found that each client's financial situation is unique and so their financial solution will be unique as well. I provide insight and guidance with a financial plan and products to suit the advice to assist the client in reaching their financial goals as well as protecting their Loved Ones and Businesses from unexpected life events.

I strive to continuously improve my skills and knowledge in the area of financial planning. As well as keep up to date with industry changes as well as legislative changes. Ensuring clients benefit from Discovery's dynamic product range and innovative reward structure." Alexzis has been in the financial industry since 2012 and since then he has held various roles at EQfin, Afken Wealth Management and First National Bank Premium Advisory Services. He has his Bcom in Finance and certificate in Financial Planning.



## CONTACT

### Website

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## QUALIFICATIONS

Bcom Finance | Bond University, 2002

Certificate in Financial Planning | Milpark Business School, 2009



## BUSINESS EXPERIENCE

EQFinn | Financial Advisor, 1year

Afken | Financial Advisor, 1year

First National Bank | Financial Planner, 1year



# DOES YOUR MONEY NEED A "PROFESSIONAL TRAINER"?

Imagine a world where finance is associated with **LIFE, TIME** and **GROWTH** rather than **ANXIETY** and **STRESS**? At attooh! We believe that your financial journey should and could be a journey of enjoyment, fulfilment and escalating success.

It really is time to put **YOU** first. Take control of your finances and allow me, as your Financial Coach to guide you along the way.

## 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



### HEALTH

- Medical aid
- Gap cover



### INVESTMENTS

- Local, guaranteed and offshore
- Retirement investments



### SHORT TERM INSURANCE

- Personal lines
- Commercial insurance



### FIDUCIARY

- Wills and Estate
- Trust and Tax solutions



### EMPLOYEE BENEFITS

- Group Risk
- Retirement Funds
- Group Health Solution

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".