

NICK BEARD

Financial Advisor & Co-author of The Ordinary Millionaire

Nick Beard entered the Financial Services industry as a Financial Advisor in 2006 at the age of 21. He quickly grew to one of the top advisors in his company and accomplished many achievements along the way. His experience over the past few years has moulded him into a mature Financial Advisor that has grown a solid client base and he continues to assist them in achieving their goals. Through this commitment he has built solid relationships and friendships within his loyal client base.

Nick now works at attooh! which is the number 1 Discovery franchise in South Africa. This has been a great move as achieving goals in life is always easier when you mix with the best. Nick is passionate about growing with his clients in terms of wealth and wellness and hopes to be one of the country's top financial advisors in the not too distant future. When you engage with him on a personal level he will take you through the entire Financial Planning process from square one and ensure that everything is put in place to achieve your relevant goals. Every single person has unique needs and his understanding of this assists in creating a long-term relationship with his clients.

Nick is happily married to Jennifer and they have 2 beautiful daughters in Amanda and Katherine. He is lucky to have grown up in a close-knit family and has learnt that loyalty, respect and common courtesy are important traits to possess for the people that interact with you daily. He attended Parktown Boys High School which showed him the importance of traditions and good values and will be forever grateful for the opportunities received there.

Sport is something that is very close to Nick's heart and you can often find him strolling down Randpark Golf Club's fairways if he's not in the Waterpolo pool or watching rugby. He lives by the ethos of having a balanced lifestyle and enjoys socialising with close friends and family in his spare time.



CONTACT

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QUALIFICATIONS

Certificate in wealth Management |
*University of Stellenbosch Business
School, 2009*

RE 5, RFP1 and RFP2 | 2013



BUSINESS EXPERIENCE

Merchant West | *Financial Advisor,*
2006 - 2009

Finlogic | *Financial Advisor, 2009 -*
2012

attooh! | *Financial Advisor, 2012 -*
present



NICK BEARD

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



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".