MARIUS FERREIRA

Financial Advisor

ABOUT **ME**

As a fresh face in the Financial Advisory field, I am excited and proud to be working for such an incredible company. The attooh! Group of Companies is an award winning, Financial Advisor Group with a national footprint. At attooh! we provide a full spectrum of corporate and individual financial services. We assist you in making your financial dreams a reality.

• Our combination of entities has been trading for more than 20 years.
• Our workforce has over 400 years of financial services experience.
• Our senior executives have over 40 years' experience in the financial arena.
• Our average Corporate client's life time exceeds 10 years.

We work closely with you to formulate a personalised financial plan that considers your current status and then helps you to work towards achieving your financial freedom and success. Our philosophy is "We make ordinary people Millionaires and make Millionaires Financially Independent" and that is my goal for each and every one of my clients. With my passion and an incredible support team who have a wealth of knowledge, I believe I can help my clients reach their financial goals.

I am always eager to learn and think it's very important to be up to date on legislation, taxation, products, practices and industry news. I regularly attend training seminars and love expanding my knowledge.

Some of the training/accreditation courses I have done are:
• BACHELOR OF MANAGEMENT LEADERSHIP (BML) - 2016
• REGULATORY EXAMINATION (RE5) - 2017
• CURRENTLY WORKING TOWARDS OBTAINING MY POSTGRADUATE DIPLOMA IN FINANCIAL PLANNING AT THE UNIVERSITY OF THE FREE STATE.

My association with the Discovery Group means I am able to offer my clients the best financial solutions from a dynamic product range, as well as the benefits of the innovative Discovery rewards programme.

With attooh! by my side, I look forward to guiding my clients on their own financial journey to achieve their full potential and financial success.

A quote that I live by is, "Learning and innovation go hand in hand. The arrogance of success is to think that what you did yesterday will be sufficient for tomorrow." - William Pollard

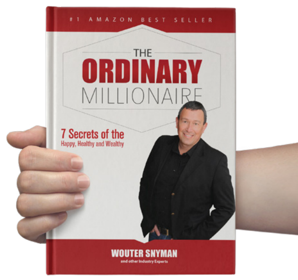
BUSINESS EXPERIENCE

Bachelors of Management Leadership | *University of the Free State | 2016*

DOWNLOAD FREE EBOOK

Are you a millionaire or on your way to Financial Independence? A team of Financial Advisors wrote the #1 Amazon Best seller, "The Ordinary Millionaire" containing the 7 secrets of the Happy, Healthy and Wealthy.

Please visit my website and download this book for FREE!



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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 Excecutor, 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.