ROELF
VAN DER MERWE
Financial Advisor

"Present myself with a smile and positive views.."

I am married to Laurette and we are blessed with two wonderful children, Roelof and Jesca -- and between them we have four grand kids. My passion is people and sport participation.

Myself and my wife achieved provincial colours in various sport disciplines...our children also achieved national colours in cricket and netball respectively.

During my career in the banking sector I achieved the high accolades in the insurance and financing departments over a career of 21 years - 2003 was the year i decided it is time for challenges out of my comfort zone - sales and building sector was for the next 5 years my haven. In 2009 I freshened up my people skills and re-entered the insurance world through Old Mutual. In 2010 I joined the best company in the insurance/assurance sector namely discovery - I enjoy my work and with the support of the biggest and best Discovery brokerage namely attooh holdings. I'm looking forward to be of best service to my current and future clients.

I live the vitality way and enjoy a great level of fitness through playing action cricket for Northern Gauteng at provincial level.

My principles in work and private life - be absolutely ethical, be an expert in your field but also surround yourself with experts, give sound and honest advice, stand out in a complex market, no client too small or too big to assist and be approachable.

CONTACT

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QUALIFICATIONS

FSB | Regulatory Examination.
Banking Diploma | Standard Bank.
Certificate in Management | Gibs.

BUSINESS EXPERIENCE

1982-1984 | Standard Bank
1984-2000 | Stannic Branch Management and Insurance.
2000-2003 | Stannic Head of credit | Motor Division.
2003-2006 | Laureus Caravans
2003-2008 | Laureus Enterprises
2009-2010 | Old Mutual | Financial Advisor
2010-2013 | Discovery | Financial Advisor

Discovery | attooh! HEALTH | WEALTH | LIFE

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 insurance

FIDUCIARY

- Wills and Estate
- Trust and Tax solutions

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".