

# WIMPIE VAN ZYL

Financial Advisor

"Live your dreams BIG..."

"Wimpie van Zyl is a Financial Planner affiliated with the attooh! Jacaranda Branch. Wimpie focuses on his clients' needs and with on-going involvement, creates awareness and help empowers his clients to make the right decisions for their financial future. His greatest passion is adding value in peoples lives and help making positive changes in peoples financial lives."

I have started my career in 2006 as a Financial adviser. I give advice in life cover, retirement, short term insurance, investments, Discovery Bank and Health. I am well qualified, having obtained my NQF5 qualifications as well as my RE 5 examination. I strive to improve my skills and knowledge constantly to keep up with the improvements and changes in the market. It is very important to always be updated with the newest changes in the financial insurance sector. I will always try to be well equipped to give my client the best possible advice on a on-going base.

Every clients is unique and they do have different needs. a Client needs to be well informed about their financial wellness and they need to take ownership of it. Honesty and respect is of great importance to me. To fulfill my clients needs I will always thrives to have his/her needs as the first priority. By treating my clients with honesty and respect I know that we could built a long happy professional relationship.

I believed that a well informed and well looked after client is a happy client and that the relationship will be base on trust. By doing a correct financial planing my client will feel that it has a life changing impact on his life.

*Wimpie van Zyl*

Financial Advisor



## CONTACT

### Website

[www.wimpievanzyl.co.za](http://www.wimpievanzyl.co.za)

### Email Address

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### Physical Address

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Pretoria East



## QUALIFICATIONS

NQFL 5 | 2012

RE | 2013



## BUSINESS EXPERIENCE

Pepco Brokers | Financial Advisor |  
2006 - 2011

PFN Financial services | Financial  
Advisor | 2011 - 2015



Discovery



# 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



### PERSONAL BANKING

- Discovery Bank



### 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".