



ATTOOH!

BRAND CREATIVES

Proudly designed and developed by HeyStudio.
This document and its contents are the intellectual property of HeyStudio.



DREAM IT • PLAN IT • CREATE IT • LIVE IT

MARKETING PLATFORM BREAKDOWN

AS PER CONTRACT

attooh! Financial Advisors Digital, Practice & Marketing Support

WEBSITE & DIGITAL INFRASTRUCTURE

- Personalised 3-page advisor website as a professional online presence.
- Includes three campaign one-page websites:
 - 1. Annual Review
 - 2. Last Will & Testament
 - 3. Contact Lead Page
 - Add on: ChatBot basic lead capture
- Connect your Calendar bookings direct to your website for clients to book meetings
- Optional blog page (*training provided; not managed on your behalf*).
- Your contact page features a QR code for lead capture at events (*POPIA compliant*).

BASIC LEAD MANAGEMENT SYSTEM

(LMS)

- Website forms link directly to the integrated LMS.
- Automatic notifications sent to Advisors upon lead submission.
- Generic sales pipeline available to track and manage leads.
- Enables admin task assignment and client note tracking.
- Dashboard provides visibility for practice oversight and internal workflow.
- Integration with Outlook calendar to sync Advisor bookings and follow-ups.
- Optional client booking links can be embedded into websites or emails.

GENERIC SOCIAL MEDIA DESIGNS & AUTOMATION

- Monthly generic social media content:
 - 8 Facebook/Instagram designs
 - 2 motivational/educational stories (*also usable for WhatsApp*)
- Ad-Hock
 - Discovery videos via WhatsApp group
 - attooh! Finance videos via WhatsApp group
 - Social Calendar day posts via WhatsApp group
- Generic banner designs for Facebook and LinkedIn.
- Social Media Dashboard access in LMS:
 - Schedule and manage social posts Monitor engagement (DIY) HeyStudio don't post on behalf of you

PRACTICE SUPPORT DOCUMENTS

- Personalised Corporate Profile
- 'My Services' one pager document
- Financial Planning documents
- Complete set of generic personalised advertisement materials ("*Personal pack*")
- One campaign mailer or approximately four Squawk mailers for existing clients
- Personalised client engagement pack

CLIENT COMMUNICATION & TOOLS

- Automated mailers per call to action for websites to connect with your potential new lead which will be triggered upon form completion

STATIONERY & DESIGN SUPPORT

- Printed business cards (*excluding printing costs*)
- Digital business card design (*annual upgrade costs excluded*)
- Branded Zoom/Teams digital backgrounds
- Branded files (*design included / print excluded*)
- attooh! Branded PowerPoint template

ADDITIONAL CAMPAIGN COSTS

- Advisor personalised campaigns and pipeline management setup not included in the monthly fee.

PERSONALISED ADD-HOCK DESIGN ON-DEMAND

- Custom design services available at R550/hour (*quoted per request*)
- Includes:
 - Adverts/Leaflets
 - Product or campaign-specific materials
 - Standard WhatsApp videos (*R1,100 per video*) *Content to be provided

ADVISOR BIOGRAPHY

NEELS STANDER

Branch Director / Financial Advisor & Co-author of *The Ordinary Millionaire*

*Neels Stander is the attooh! Cape Town Branch Director. He brings with him more than 25 years of experience in the Financial Industry. At the core of Neels' practice is his need to protect and enhance his clients' financial wellness, and consistently encourage and motivate his team to do the same.

Neels understands that in this volatile economic environment, it is important to stay focused, knowledgeable, and goal-oriented within every aspect of your financial portfolio. His objective is to guide clients to financial success, by protecting their dependents, and businesses and employees, from unexpected life events, adding value to their journey to financial freedom.

Spending four years in the Defence Force with the Bank of Lesotho/BSB gained tremendous experience in a strong, disciplined environment, one which he has carried through to his financial career. This is can easily be seen from the numerous awards he has won within the industry, some of which include Saabou Bank's Top 10 Financial Advisors, Frost Risk Managers' Financial Planner of the Year, Discovery Life Platinum Prestige Intermediary and the Old Mutual Top 100 Independent Financial Advisor award.

Neels' personal life experience combined with his qualifications and work experience enables him to walk a path with his clients and his team of Advisors alike, creating professional partnerships based on mutual interests. His association with Discovery goes back more than a decade and includes several awards and accolades, enabling him to provide a high standard of advice regarding the Discovery Group of Products.

Neels specialises in numerous financial areas, and along with his team of Advisors, and support staff, provide clients with exceptional advice and service in the areas of Life and Disability Assurance, 99d Planning, Investment Savings and Planning, Healthcare Planning, Pre- and Post-retirement Planning, Short-term Insurance, Discovery Issure, Trusts and Wills.

In association with the attooh! Group of Companies and with a proficient team of Advisors and Support staff, Neels offers an expert hand in the planning of clients' future, and is passionate about guiding clients in their financial potential, ensuring their future financial success!



Branch Director



CONTACT

Website
www.neelsstander.co.za

Email Address
neels@attooh.co.za

Mobile / Office Number
+27(0)21 260 1368 / +27(0)80 133 3828

Physical Address
Discovery / attooh! Unit 7 B, The Ridge Office Park, Dooiebaai Avenue, Kenilworth, Bellville

ACHIEVEMENTS

Discovery Life Gold Prestige Intermediary | 2014, 2004 and 2007

Metropolitan Odyssey Top 100 Independent Financial Advisor | 2003

Old Mutual Top 100 Independent Financial Advisor | 2007




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, fulfillment 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

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 "purposeful purpose".

ADVISOR ONE PAGER






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, fulfillment 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

PERSONAL BANKING

WILLS & ESTATES

HEALTH

- Medical aid
- Gap cover

INVESTMENTS

- Local, guaranteed and offshore
- Retirement investments

SHORT TERM INSURANCE

- Personal lines
- Commercial insurance

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.**

Speak to me today about these benefits and how they fit into your personal financial plan

Ashley Paulis | Financial Advisor

+27(0)71 298 6598 | ashley.paulis@attooh.co.za | www.ashleypaulis.co.za

ADVISOR PERSONAL PACK

Personalise A5 adverts for print

Discovery | attooh!



DOES YOUR MONEY NEED A PROFESSIONAL TRAINER?"?

My services include:
**Life | Invest | Health | Vitality | Bank
 Business Insurance | Insure | Fiduciary**



Rene du Preez
 Financial Advisor
 E: rene@attooh.co.za
 C: +27(0)79 851 0449 // 0861 288 664
 W: www.renedupreez.co.za

atoooh Consulting Services Holdings Pty Ltd is a public representative of Discovery Life Ltd, an Authorised Financial Services Provider, FSP16127

Discovery | attooh!



YOU CAN FOCUS ON LIFE, WHILE I FOCUS ON YOUR RETIREMENT!

My services include:
**Life | Invest | Health | Vitality
 Bank | Wills & Estates | Insure**



Ashley Paulis
 Financial Advisor
 E: ashley.paulis@attooh.co.za
 C: +27(0)71 298 6598
 W: www.ashleypaulis.co.za

atoooh Consulting Services Holdings Pty Ltd is a public representative of Discovery Life Ltd, an Authorised Financial Services Provider, FSP16127

Discovery | attooh!



THE FINANCIAL CHOICES YOU MAKE TODAY WILL SHAPE YOUR FAMILY'S TOMORROW!

My services include:
**Life | Invest | Health | Vitality | Bank
 Business Insurance | Insure | Fiduciary**



Ben Nel
 Financial Advisor
 E: ben.nel@attooh.co.za
 C: +27(0)82 838 7886
 W: www.bennel.co.za

atoooh Consulting Services Holdings Pty Ltd is a public representative of Discovery Life Ltd, an Authorised Financial Services Provider, FSP16127

Discovery | attooh!



LIFE CAN BE UNEXPECTED. IS YOUR WILL UP TO DATE?

My services include:
**Life | Invest | Health | Vitality
 Bank | Wills & Estates | Insure**



Dale Cornelison
 Financial Advisor
 E: dale.cornelison@attooh.co.za
 C: +27(0)83 383 8000
 W: www.dalecornelison.co.za

atoooh Consulting Services Holdings Pty Ltd is a public representative of Discovery Life Ltd, an Authorised Financial Services Provider, FSP16127

Discovery | attooh!



LIFE CAN BE UNEXPECTED. IS YOUR WILL UP TO DATE?

My services include:
**Life | Invest | Health | Vitality
 Bank | Wills & Estates | Insure**



Kobus Oberholster
 Financial Advisor
 E: kobus@attooh.co.za
 C: +27(0)82 330 8607
 W: www.kobusoberholster.co.za

atoooh Consulting Services Holdings Pty Ltd is a public representative of Discovery Life Ltd, an Authorised Financial Services Provider, FSP16127

Discovery | attooh!



GIVE YOUR CHILDREN THE GIFT OF EDUCATION AND WATCH THEIR DREAMS COME TRUE
 with Discovery Life's Global Education Protector.

My services include:
**Life | Invest | Health | Vitality
 Bank | Wills & Estates | Insure**



Ryan Taylor
 Financial Advisor
 E: ryan.taylor@attooh.co.za
 C: +27(0)60 749 6903
 W: www.ryantaylor.co.za

atoooh Consulting Services Holdings Pty Ltd is a public representative of Discovery Life Ltd, an Authorised Financial Services Provider, FSP16127

Discovery | attooh!



HOW TO EARN UP TO 50% fuel cash back each month!

Discover the exclusive benefits and savings of Vitality Drive!
 Reach out to me for personalised assistance in maximizing your savings with Discovery Insure.



Ashley Paulis
 Financial Advisor
 +27(0)71 298 6598
 ashley.paulis@attooh.co.za
 www.ashleypaulis.co.za
 36 Cathedral Street, George 6529

atoooh Consulting Services Holdings Pty Ltd is a public representative of Discovery Life Ltd, an Authorised Financial Services Provider, FSP16127

Discovery | attooh!



COMPREHENSIVE SUPPORT FOR ALL MEDICAL AID RELATED NEEDS

I can assist you with the following:

- Medical savings account support
- Chronic medication registration
- Claims assistance
- Maximising medical aid benefits
- Adding or removing members
- Exploring alternative medical aid options
- Yearly tax certificate guidance
- Hospital authorisation facilitation or questions
- Addressing concerns or matters
- Any other medical aid-related matters

Reach out now, and I'll be at your service ASAP!



Ricus Venter
 Branch Director
 +27(0) 82 850 8674
 ricus.venter@attooh.co.za
 www.ricusventer.co.za
 230m Office Park West, Bryanston, Johannesburg 2193

atoooh Consulting Services Holdings Pty Ltd is a public representative of Discovery Life Ltd, an Authorised Financial Services Provider, FSP16127

Discovery | attooh!



DISCOVERY INSURE CLIENTS SAVE UP TO 20% ON PURCHASES AT TIGER WHEEL & TYRE

Discover the exclusive benefits and savings of Vitality Drive!
 Reach out to me for personalised assistance in maximizing your savings with Discovery Insure.



Paul Erasmus
 Financial Advisor
 +27(0)82 497 8322
 paul.erasmus@attooh.co.za
 www.paulerasmus.co.za
 3 Floor of Harcourt View Office, Bendori, Pakiswami, Limpopo

atoooh Consulting Services Holdings Pty Ltd is a public representative of Discovery Life Ltd, an Authorised Financial Services Provider, FSP16127



ADVISOR PERSONAL PACK

Personalise generic WhatsApp adverts

LIFE CAN CHANGE IN AN INSTANT.
ARE YOU PREPARED FOR THE UNEXPECTED?

#ThinkAheadAhead

Don't leave your financial future to chance; let's create a plan tailored just for you.

My services include:
Life | Invest | Health | Vitality | Bank Wills & Estates | Insure

Kobus Oberholster
Financial Advisor
E: kobus@attooh.co.za
C: +27(0)82 1308667
W: www.kobusoberholster.co.za

Scan me to set up a meeting!

WHAT IF TOMORROW WAS DIFFERENT?
SECURE YOUR PEACE OF MIND TODAY.

#BeFinanciallyPrepared #SecureYourFuture

Tomorrow's uncertainties are closer than they appear; I'm here to help you navigate with confidence.

My services include:
Life | Invest | Health | Vitality | Bank Wills & Estates | Insure

Kwanele Sibanda
Financial Advisor
E: kwanele.sibanda@attooh.co.za
C: +27(0)78 908 7747
W: www.kwanelesibanda.co.za

Scan me to set up a meeting!

WHEN LIFE THROWS YOU A CURVEBALL, BE READY TO CATCH IT!

#StayOneStepAhead

Let's strategise together, and plan your financial journey, so you're not just catching curveballs but hitting home runs.

My services include:
Life | Invest | Health | Vitality | Bank Wills & Estates | Insure

Ryan Taylor
Financial Advisor
E: ryan.taylor@attooh.co.za
C: +27(0)0 749 6983
W: www.ryantaylor.co.za

Scan me to set up a meeting!

LIFE'S UNCERTAINTIES ARE INEVITABLE.
HOW READY ARE YOU?

#SecureYourFuture #BeFinanciallyPrepared

Crafting a solid financial plan today ensures you're ready for any of life's surprises.

My services include:
Life | Health | Invest | Short Term | Fiduciary Employee Benefits | Business Insurance

Ricus Venter
Branch Director
E: ricus.venter@attooh.co.za
C: +27(0)82 850 8674
W: www.ricusventer.co.za

Scan me to set up a meeting!

CHERISH TODAY, BUT ALWAYS BE PREPARED FOR LIFE'S UNEXPECTED SURPRISES.

#PlanForYourFuture #BeFinanciallyPrepared

With the right financial strategy, you can enjoy today and anticipate a secure tomorrow.

My services include:
Life | Invest | Health | Vitality | Bank Wills & Estates | Insure

Paul Erasmus
Financial Advisor
E: paul.erasmus@attooh.co.za
C: +27(0)82 497 8312
W: www.paulerasmus.co.za

Scan me to set up a meeting!

IN THE FACE OF UNEXPECTED CHALLENGES, ARE YOU FINANCIALLY SECURE?

#ProtectYourJourney

Let's secure your financial journey against unexpected events and challenges together.

My services include:
Life | Invest | Health | Vitality | Bank Wills & Estates | Insure

Marvin Sekadi
Financial Advisor
E: marvin.sekadi@attooh.co.za
C: +27(0)68 210 6981
W: www.marvinsekadi.co.za

Scan me to set up a meeting!

YOUR HEALTH IS PRECIOUS.
WHAT IF THE UNFORESEEN LIFE EVENT HAPPENS?

#PlanForTomorrowToday

Your health and wealth go hand-in-hand; let's ensure both are protected for the long haul.

My services include:
Life | Invest | Health | Vitality | Bank Wills & Estates | Insure

Johan Grabbelaar
Financial Advisor
E: johan.grabbelaar@attooh.co.za
C: +27(0)76 376 0571
W: www.johangrabbelaar.com

Scan me to set up a meeting!

UNPLANNED MOMENTS CAN CHANGE EVERYTHING.
IS YOUR FINANCIAL PLAN RESILIENT ENOUGH?

#BuildYourSafetyNet

Together, we can build a financial safety net that stands strong against life's unexpected turns.

My services include:
Life | Invest | Health | Vitality | Bank Wills & Estates | Insure

Ashley Paulis
Financial Advisor
E: ashley.paulis@attooh.co.za
C: +27(0)71 298 6598
W: www.ashleypaulis.co.za

Scan me to set up a meeting!

The QR CODE will take you to your contact.yourname page where a new lead can complete a form to contact you.

Gone are the days that you run around with an Excel sheet as that is not Popia compliant.



ADVISOR PERSONAL PACK

Personalise generic social media posts

Discovery | attooh!

Does your money need a "professional trainer"

Contact me:



Ashley Paulis
Financial Advisor

www.ashleypaulis.co.za | +27(0)71 298 6598

Discovery | attooh!



Speak to me today for your personal, business and wellness needs

My services include:

Life | Invest | Health | Vitality
Bank | Wills & Estates | Insure

Ben Nel
Financial Advisor

www.bennel.co.za | +27(0)82 638 7886

Discovery | attooh!

Having a Financial plan in place will give you the ultimate peace of mind.



Health | Vitality | Life | Invest | Insure | Bank



Schane van Zijl
Financial Advisor

www.schanevanzijl.co.za | +27(0)178 099 6593

Discovery | attooh!

Thank you for letting me help you plan for a FINANCIALLY SECURE FUTURE...



Health | Vitality | Life | Invest | Insure | Bank



Dale Cornelison
Financial Advisor

www.dalecornelison.co.za | +27(0)83 383 8000

Discovery | attooh!

Thank you for trusting me help grow your wealth and protect your assets



Health | Vitality | Life | Invest | Insure | Bank



Howard Giger
Financial Advisor

www.howardgiger.co.za | +27(0)78 020 9802

Discovery | attooh!

Does your retirement plan provide you with an income for the rest of your life?



Health | Vitality | Life | Invest | Insure | Bank



Johan Grobbelaar
Financial Advisor

www.johangrobbelaar.com | +27(0)76 376 0571

Discovery | attooh!

The Financial choices you make today will shape your family's tomorrow!



Health | Vitality | Life | Invest | Insure | Bank



Kobus Oberholster
Financial Advisor

www.kobusoberholster.co.za | +(0)82 330 8607

ADVISOR PERSONAL PACK

LinkedIn Banners



Does your money need a **"professional trainer"**?
Let me help you chase **your** financial goals!

Discovery | attooh!
HEALTH | WEALTH | LIFE

attooh Consulting Services Holdings (Pty) Ltd, a joint representative of Discovery Life Ltd, an Authorized Financial Services Provider, FSP5181



Discovery | attooh!
HEALTH | WEALTH | LIFE

Does your money need a **"professional trainer"**?
Let me help you chase **your** financial goals!

attooh Consulting Services Holdings (Pty) Ltd, a joint representative of Discovery Life Ltd, an Authorized Financial Services Provider, FSP5181



Discovery | attooh!
HEALTH | WEALTH | LIFE

Does your money need a **"professional trainer"**?
Let me help you chase **your** financial goals!

attooh Consulting Services Holdings (Pty) Ltd, a joint representative of Discovery Life Ltd, an Authorized Financial Services Provider, FSP5181



Discovery | attooh!
HEALTH | WEALTH | LIFE

Does your money need a **"professional trainer"**?
Let me help you chase **your** financial goals!

attooh Consulting Services Holdings (Pty) Ltd, a joint representative of Discovery Life Ltd, an Authorized Financial Services Provider, FSP5181



Discovery | attooh!
HEALTH | WEALTH | LIFE

Does your money need a **"professional trainer"**?
Let me help you chase **your** financial goals!

attooh Consulting Services Holdings (Pty) Ltd, a joint representative of Discovery Life Ltd, an Authorized Financial Services Provider, FSP5181



Discovery | attooh!
HEALTH | WEALTH | LIFE

Does your money need a **"professional trainer"**?
Let me help you chase **your** financial goals!

attooh Consulting Services Holdings (Pty) Ltd, a joint representative of Discovery Life Ltd, an Authorized Financial Services Provider, FSP5181



Does your money need a **"professional trainer"**?
Let me help you chase **your** financial goals!

Discovery | attooh!
HEALTH | WEALTH | LIFE

attooh Consulting Services Holdings (Pty) Ltd, a joint representative of Discovery Life Ltd, an Authorized Financial Services Provider, FSP5181



ADVISOR WHATSAPP BANNERS

WhatsApp Banners for your profile (GC & IFA)

Advisor Banners



Practice Banners



Logo Profile Picture



ADVISOR MEET MY TEAM BROCHURE

Includes the advisors biography and team plus service providers

Discovery **attooh!**

Neels Stander

MEET MY TEAM

"We make ordinary people Millionaires and make Millionaires Financially Independent."

ABOUT ME

Neels Stander is the attooh! Cape Town Branch Director. He brings with him almost 30 years of experience in the financial industry. At the core of Neels' practice is his need to protect and enhance his clients' financial wellness, and consistently encourage and motivate his team to do the same.

Neels understands that in this volatile economic environment, it is important to stay focused, knowledgeable and goal-oriented with every aspect of your financial portfolio. His objective is to guide clients to financial success, by protecting their dependents, and businesses and employees, from unexpected life events, adding value to their journey to financial freedom.

Spending four years in the Defence Force with the rank of Lieutenant, Neels gained tremendous experience in a strong, disciplined environment, one which he has carried through to his financial career. This is clearly seen from the numerous awards he has won within the industry, some of which include Scorbuis Bank's Top 10 Financial Advisors, Three Risk Managers Financial Planner of the Year, Discovery Life Platinum Prestige Intermediary and the Old Mutual Top 100 Independent Financial Advisor award.

Neels' personal life experience combined with his qualifications and work experience enables him to walk a path with his clients and his team of Advisors alike, creating professional partnerships based on mutual interests. His association with Discovery goes back more than a decade and includes several awards and accolades, enabling him to provide a high standard of advice regarding the Discovery Group of Products.

Neels specialises in numerous financial areas, and along with his team of Advisors, and support staff, provide clients with exceptional advice and service in the areas of Life and Disability Insurance, Risk Planning, Investment Savings and Planning, Healthcare Planning, Pre- and Post-retirement Planning, Short-term Insurance, Discovery Insure, Trusts and Wills.

In association with the attooh! Group of Companies and with a proficient team of Advisors and Support staff, Neels offers an expert hand in the planning of clients' future, and is passionate about guiding clients in their financial potential, ensuring their future financial success!

ASSISTED BY:

- LINDA DELL (DISCOVERY INVESTMENT)
- JOLANDA BARAKAT (DISCOVERY INVESTMENT)
- RELSA THOROLD (DISCOVERY INVESTMENT)
- YOLANDY BRUNSTER (DISCOVERY INVESTMENT)
- LIME WELLCOME (DISCOVERY INVESTMENT)
- SHAWN JACOBS (DISCOVERY INVESTMENT)
- DEMI RADICMAN (DISCOVERY INVESTMENT)
- CARREN HENNING (DISCOVERY INVESTMENT)
- CHANE SCHIRMER (DISCOVERY INVESTMENT)
- RIKHARDI SCHEEPERS (DISCOVERY INVESTMENT)

Price is what you pay, value is what you get.

ATTOOH'S CORE FOCUS AREAS

Everyone deserves a life of holistic financial wellbeing. We offer services that empower individuals, businesses, and corporates at all levels of the economic spectrum. It is more than mere products, it's integrated tailor-made solutions.

- INDIVIDUAL / FAMILY INSURANCE**
 - Life cover
 - Disability
 - Severely Illness
 - Income continuation benefit
 - Tax Free Investment Savings
 - Retirement planning
 - Educational savings
- BUSINESS INSURANCE**
 - Keyman Insurance
 - Buy/Sell Agreements
 - Contractual Liability
- PERSONAL BANKING**
- HEALTH**
 - Medical aid
 - Capex cover
- INVESTMENTS**
 - Local, guaranteed and offshore
 - Retirement Investments
- SHORT TERM INSURANCE**
 - Personal lines
 - Commercial Insurance
- FIDUCIARY**
 - Wills and Estates
 - Trust and Tax solutions
- EMPLOYEE BENEFITS**
 - Group Risk
 - Pension & Provident Funds
 - Group Health Solutions
- WELLNESS MANAGEMENT**
 - Wellness rewards
 - Wellness days
 - Activity

Only applicable to C&C services

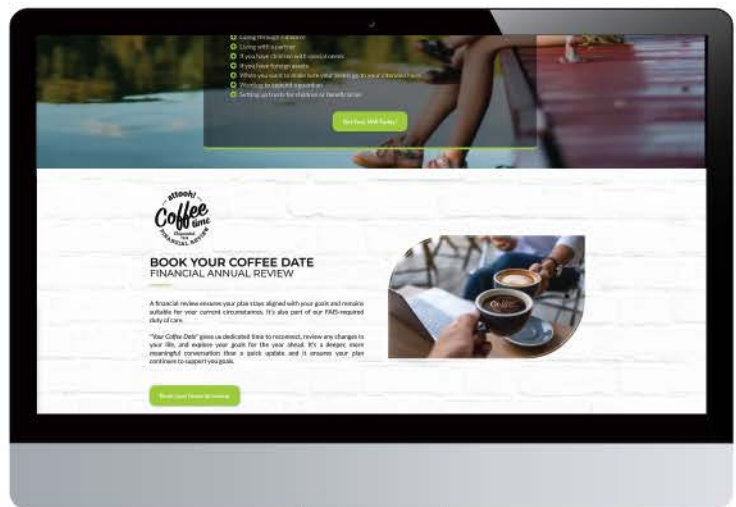
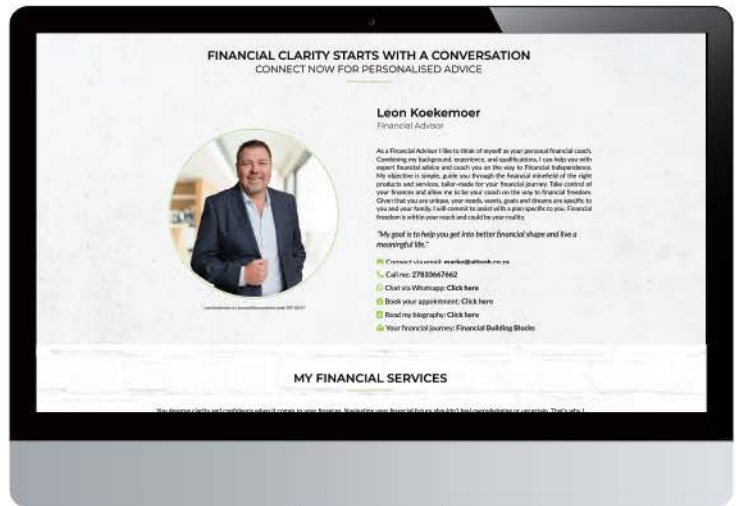
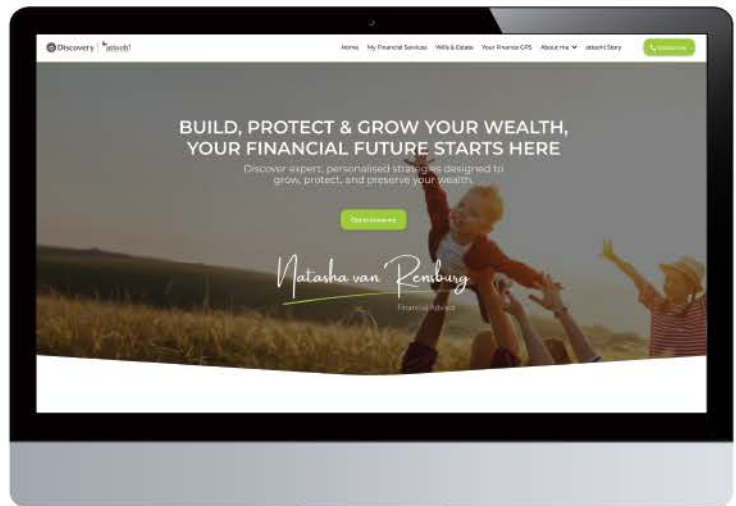
LET'S HAVE *Coffee*

A life without a financial planner can be one of stress and frustration about your finances. We truly believe that it could and should be the opposite. Allow us to give you the tools, knowledge and support to live a life of financial freedom, a abundance and independence. We've got the know-how and the heart to create your dream life with you. Thank you for taking the time to read this and we cannot wait to have coffee with you soon.

CONTACT ME
 C: +27 (0)82 388 3308 | O: +27 (0)86 133 3828
 neels@attooh.co.za | www.neelsstander.co.za

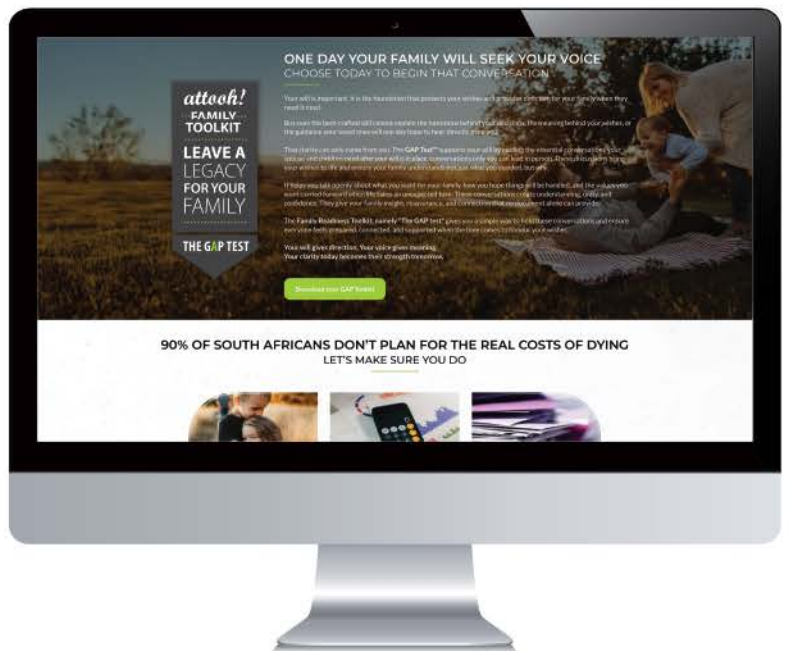
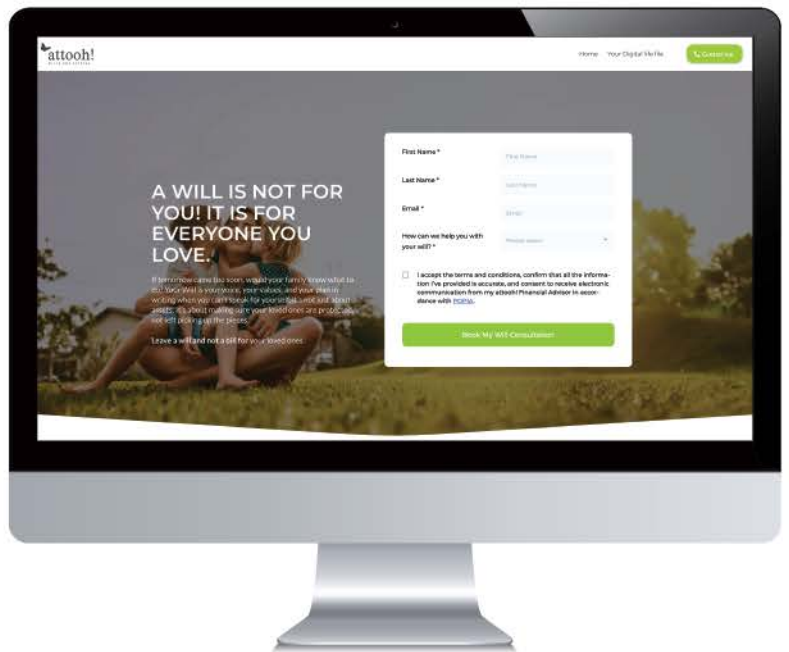
ADVISOR WEBSITES

Home Page



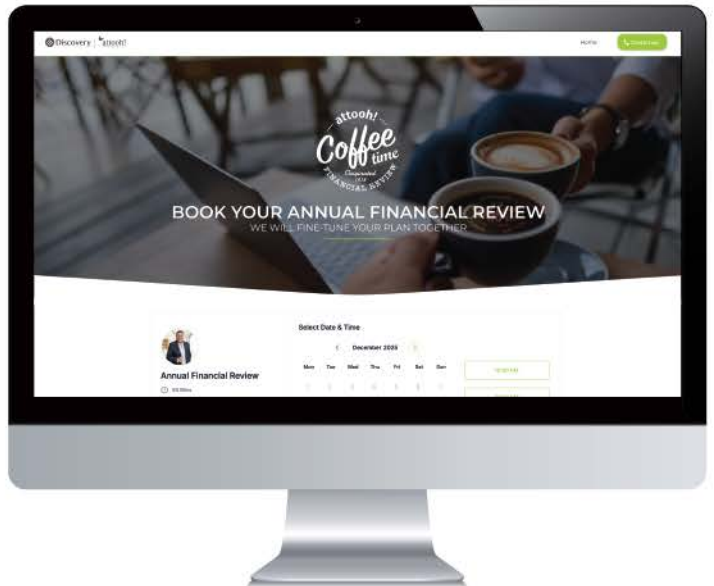
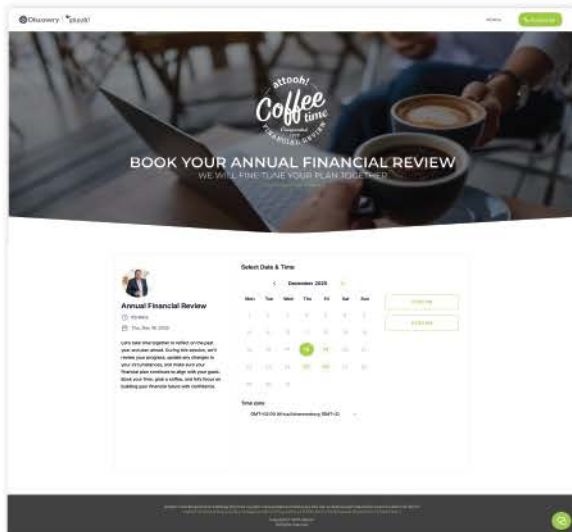
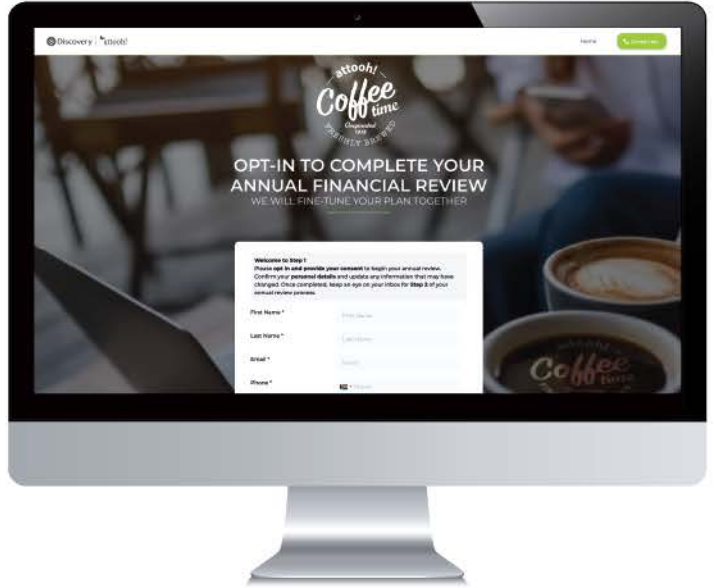
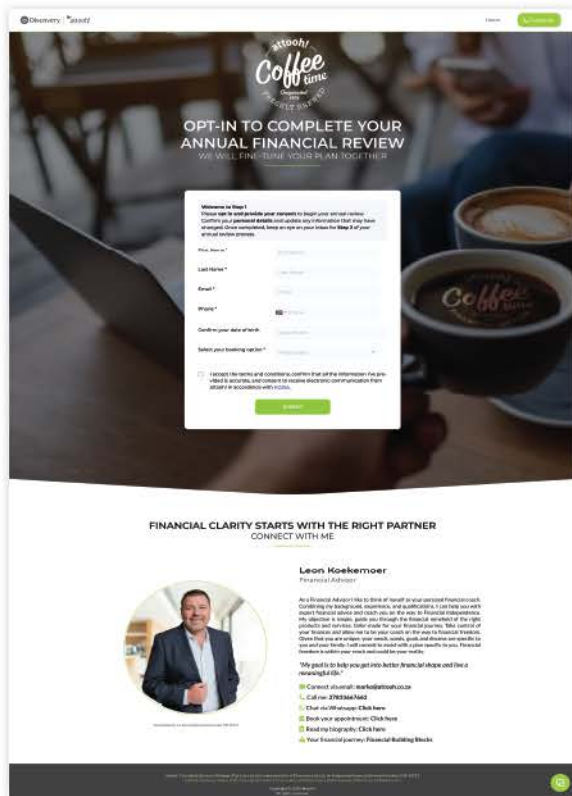
ADVISOR WEBSITES

Wills Page



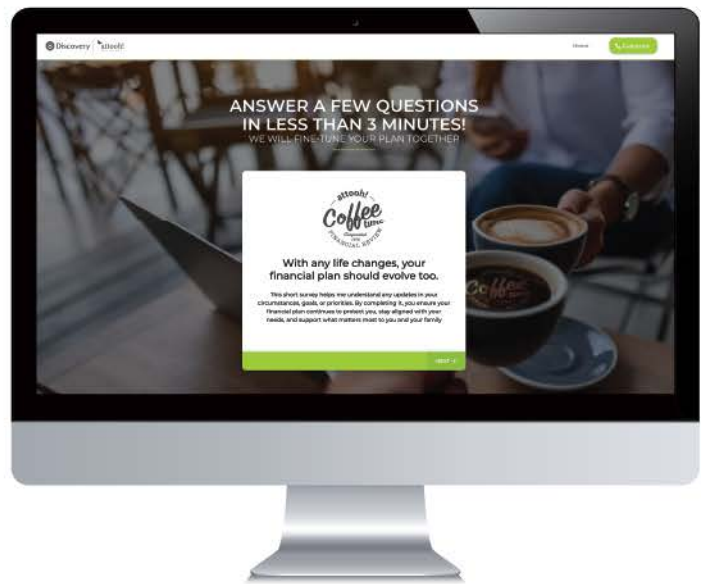
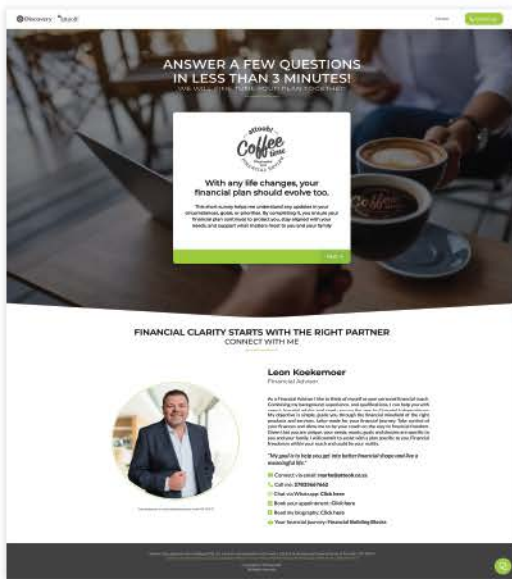
ADVISOR WEBSITES

Annual Review

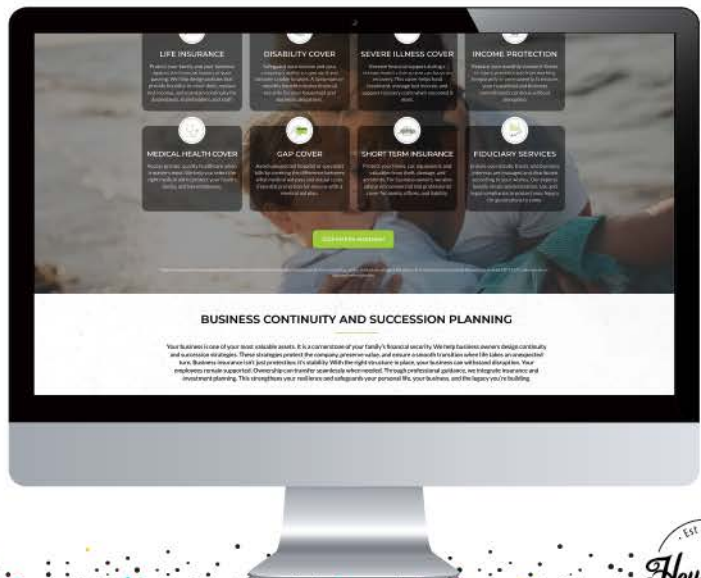
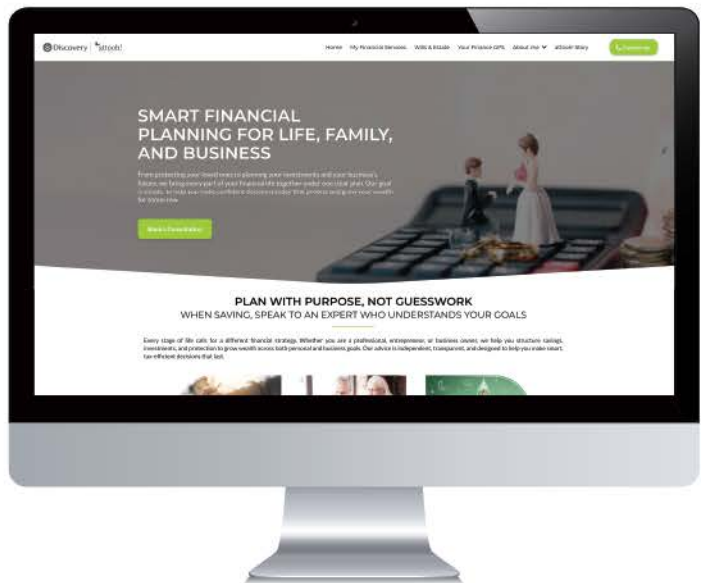
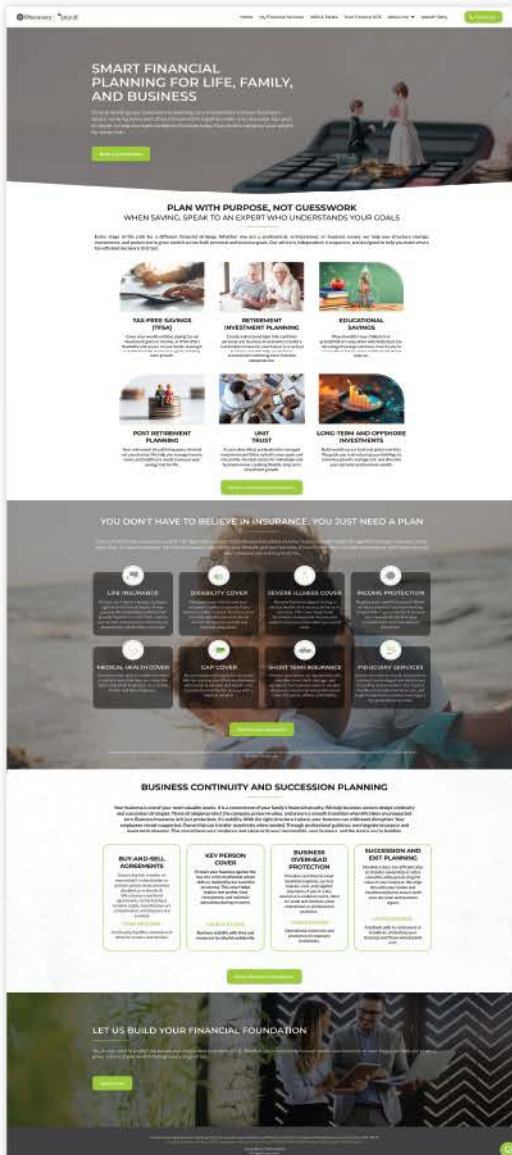


ADVISOR WEBSITES

attooh! "Coffee Date" Survey (Annual Review survey)



My Services



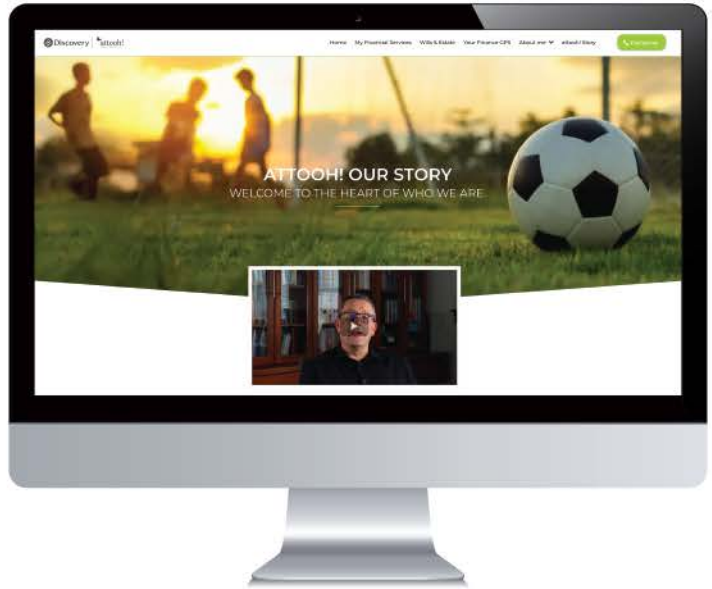
ADVISOR WEBSITES

Testimonials

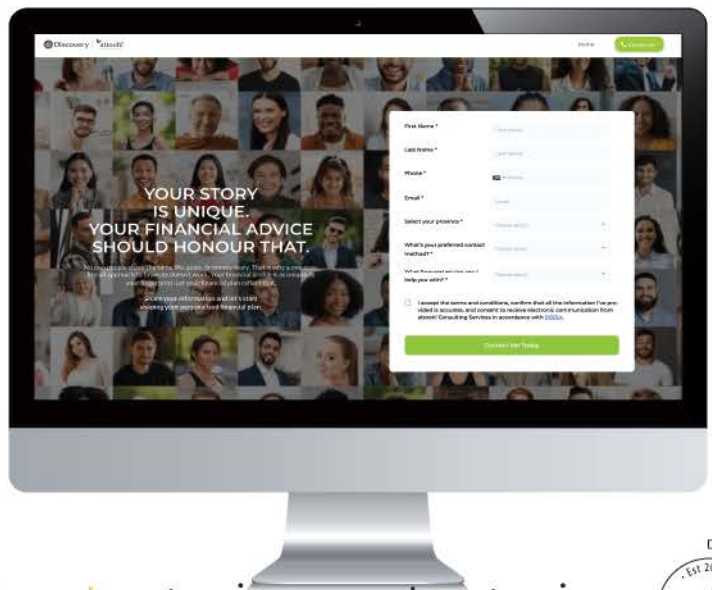
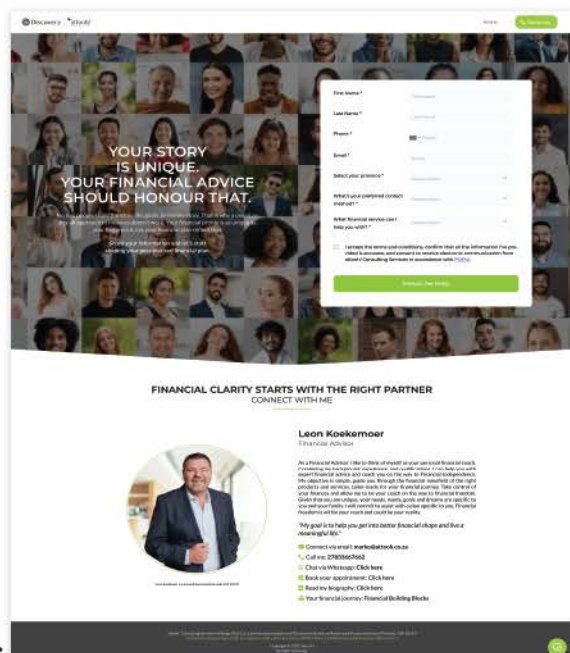


ADVISOR WEBSITES

attooh! Our Story



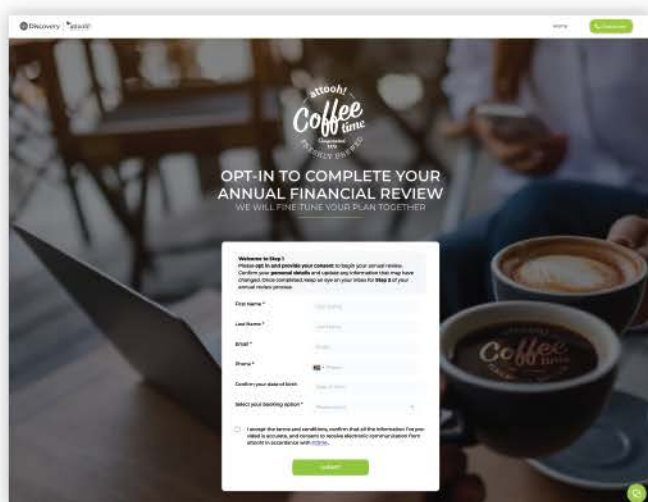
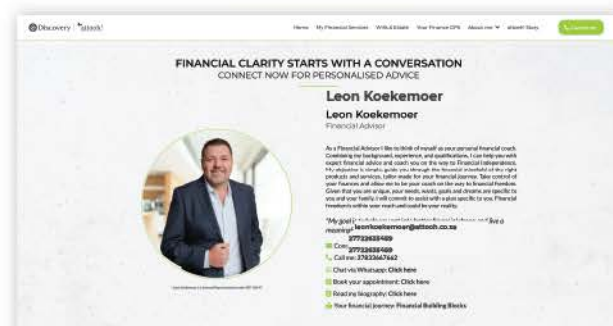
attooh! Contact Page



ADVISOR WEBSITES - NEW AND IMPROVED

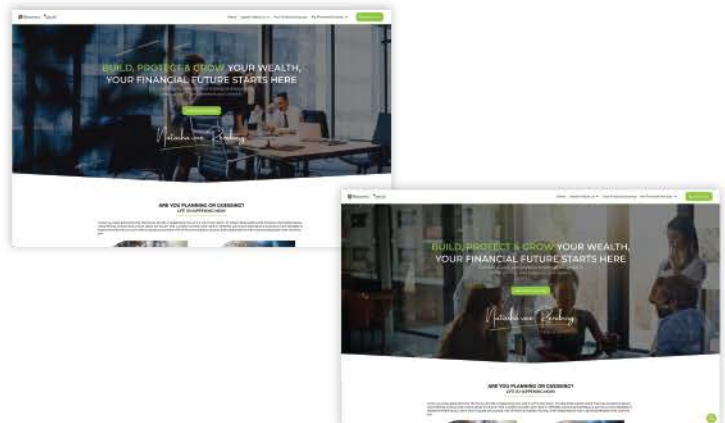
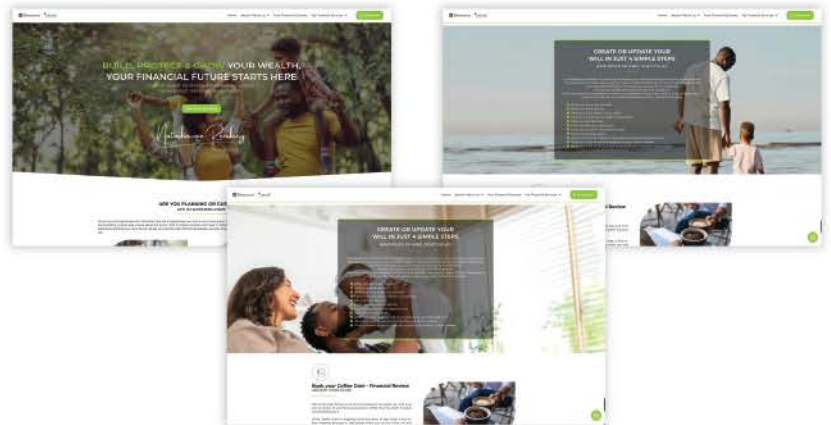
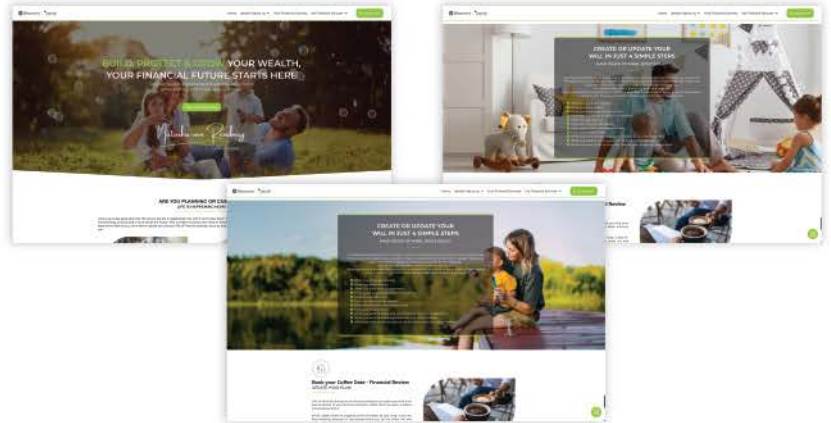
New Features in the Heystudio Advisor Platform v2

1. **Redesigned Advisor Websites** - modern, client-friendly layouts that improve navigation and help generate more leads.
2. **New Chat Widget** - engage visitors instantly and convert more website traffic into leads.
3. **WhatsApp Integration** - clients can now contact you directly via WhatsApp from your website.
4. **Smart Online Booking System** - clients can book meetings on your website at times you choose, making scheduling effortless.
5. **Outlook Integration (Two-Way Sync)** - streamline communication with a seamless email hub.
6. **Upgraded Pipeline & Opportunity Management** - track, manage, and convert leads more efficiently.
7. **Annual Financial Review** - "Coffee Date" - brand new survey and a dedicated website page and process to simplify compliance and make reviews easier for advisors.
8. **Refer-a-Friend Page** - empower clients to refer others and grow your business organically.
9. **Automated Workflows** - all website forms (wills, contact pages, and more) are now fully automated so you can focus on advising while we handle the admin.
10. **Real-Time Notifications** - stay updated on leads, tasks, notes, and more with smart alerts that keep you in control.
11. **User-Friendly Dashboard** - upload your client database, request support, and manage your practice all in one place.
12. **New Help Guide Wiki** - step-by-step guidance through every feature and benefit, eliminating guesswork.
13. **Branded Social Media & Communication Templates** - ready-to-use, professional templates to boost your client engagement.
14. **Google Business Profile Integration** - easily connect and monitor your reviews, track client feedback, and manage your online reputation.



ADVISOR WEBSITES - NEW AND IMPROVED

Option to choose your images based on your client demographic



ADVISOR CHAT WIDGET

Chat Widget New Leads – Process Overview

The ADV Chat Widget is designed to capture new lead enquiries directly from the advisor's website and initiate an automated response and follow-up workflow. Below is a step-by-step breakdown of what happens when a person interacts with the widget:

1. User Interaction

The website visitor completes the following steps in the chat widget:

- Full Name
- Email Address
- Phone Number
- Selects their desired Financial Service from a drop down list
- Types a message or question related to the selected service
- Accepts the consent clause (POPIA compliance)
- Clicks the Submit button

2. Workflow Triggered

After submission, an automated workflow is triggered to handle the lead efficiently:

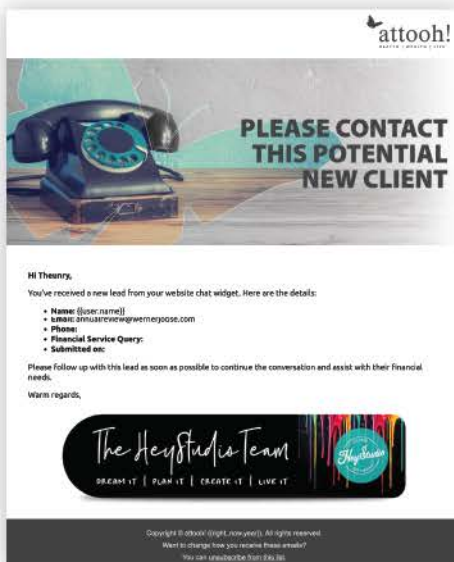
◦ Advisor Notification

An email is sent to the assigned advisor (and/or assistant) in the relevant sub-account.

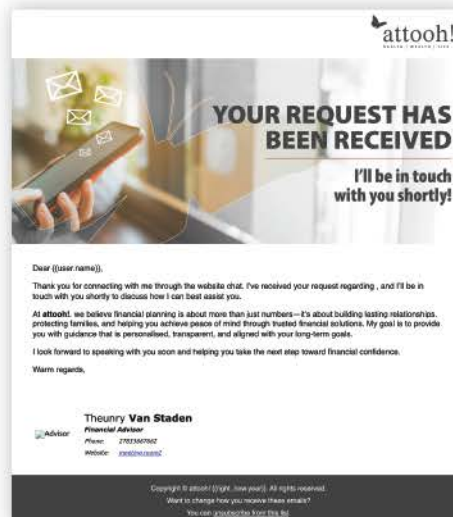
- The email uses a preformatted template that includes:
 - The new lead's name, email, and phone number
 - The selected financial service
 - The message body containing the client's question

Chat widget

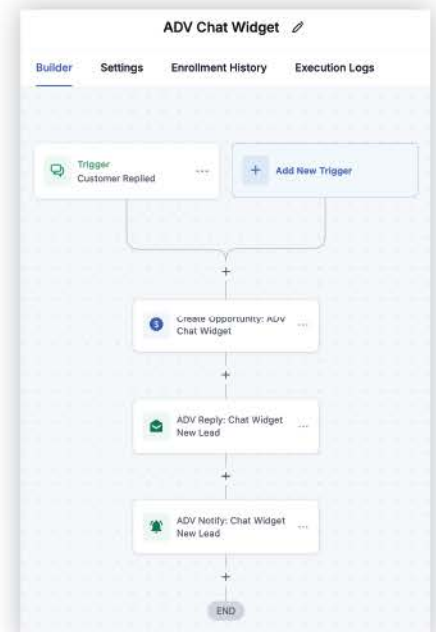
Advisor notified of new chat widget lead



Advisor reply to new lead



Chat widget new lead workflow process



ADVISOR WEBSITES CALENDAR BOOKING

All website pages will have this feature

READY TO TAKE CONTROL OF YOUR FINANCIAL FUTURE?
Connect with a trusted attooh! Financial Advisor and start your journey toward financial freedom today.



Leon Koekemoer
Financial Advisor

As a Financial Advisor I like to think of myself as your personal financial coach. Combining my background, experience, and qualifications, I can help you with expert financial advice and coach you on the way to Financial Independence. My objective is simple, guide you through the financial minefield of the right products and services, tailor-made for your financial journey. Take control of your finances and allow me to be your coach on the way to financial freedom. Given that you are unique, your needs, wants, goals and dreams are specific to you and your family, I will commit to assist with a plan specific to you. Financial freedom is within your reach and could be your reality.

"My goal is to help you get into better financial shape and live a meaningful life."


Email: leonkoekemoer@attooh.co.za
Call: **27722635459**
Call: **27722635459**
Whatsapp: [Click here](#)
Make an appointment: [Click here](#)

[My Biography](#)
[Financial Building Blocks](#)


Make an appointment: [Click here](#)

attooh! Advisor Appointment Schedule


Search



15 Minute Meeting
Book Your Consultation with Theunry Van Staden – an attooh! Financial Advisor. Schedu...
15 mins



30 Minute Meeting
Book Your Consultation with Theunry Van Staden – an attooh! Financial Advisor. Schedu...
30 mins



60 Minute Meeting
Book Your Consultation with an attooh! Financial Advisor Schedule a one-on-one meeting with ...
1 hr

attooh! Advisor Appointment Schedule

60 Minute Meeting

60 Mins
Thu, Sep 11, 2025

Book Your Consultation with an attooh! Financial Advisor
Schedule a one-on-one meeting with a trusted attooh! advisor to discuss your financial goals, whether it's insurance, investments, estate planning, or overall financial wellness. Choose a time that suits you, and your advisor will connect with you to provide expert guidance tailored to your needs.

Select Date & Time

September 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Time zone
GMT+02:00 Africa/Johannesburg (GMT+2)

- 08:00 AM
- 08:30 AM
- 09:00 AM
- 09:30 AM
- 10:00 AM
- 10:30 AM
- 11:00 AM
- 11:30 AM

A client can choose a 15/30/60 minute slot in a Financial Advisors Diary.



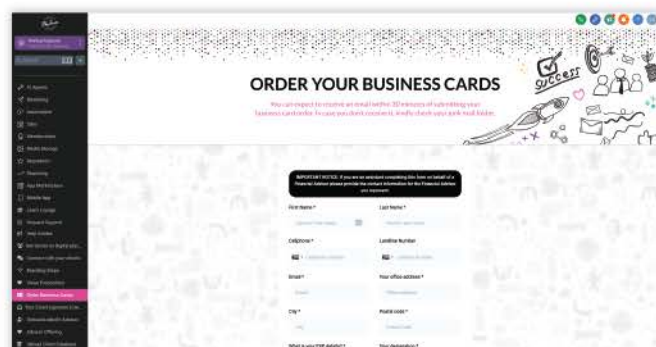
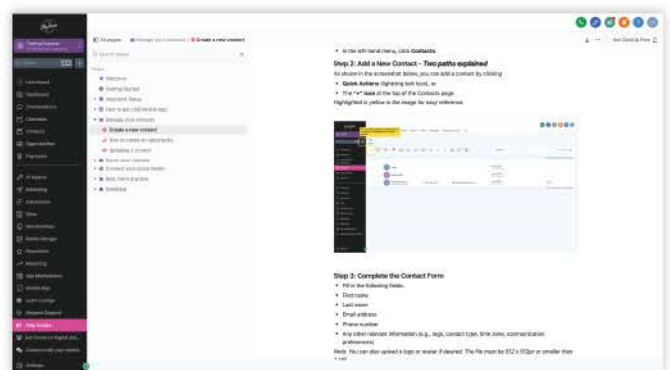
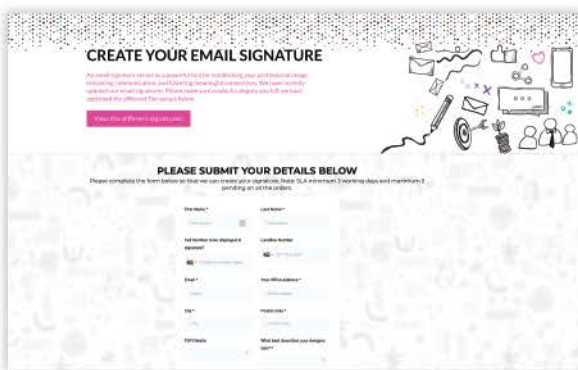
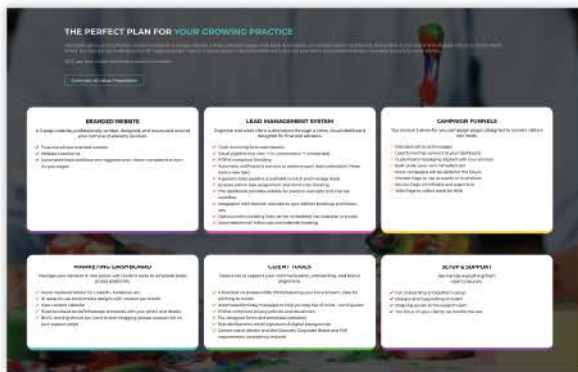
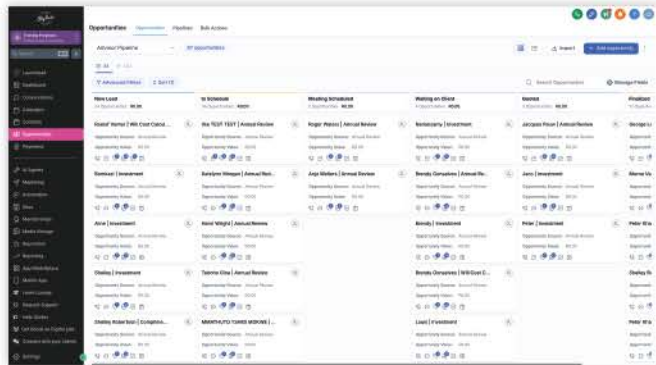
ADVISOR LEAD MANAGEMENT DASHBOARD

Advisor website lead forms will connect to your dashboard

NOTE:

- Download and manage your Social Media from your Dashboard
- Automated mailers to your clients
- Nurture your Leads in a Pipeline.

In Summary your Dashboard and Websites will offer you the following:



ADVISOR ONBOARDING PER BRANCH

attooh! Advisor onboarding process

1 Select your account

2 Click on 'Onboard attooh! advisor'

3 Complete this onboarding invite form

4 Submit the advisor information, the advisor will receive emails from Heystudio to start onboarding onto the platform

Internal Distribution Only
Please enter the financial advisor's name and email below so HeyStudio can begin the digital onboarding process. The advisor will be guided through each step and will have the option to opt out at any point.

Advisor Information

First Name *
Last Name *
Email *

Select an attooh! branch
Select a branch

By submitting this form, you confirm that all advisor information provided is correct and consent to receiving future communications from attooh! and HeyStudio, in full compliance with POPIA.

SUBMIT

YOUR DIGITAL FOUNDATION. DONE FOR YOU. TO SUPPORT YOUR PRACTICE.

Launch your own digital advisor platform, complete with a 5-page branded website, 3 lead gen pages, and a full social identity built in your name and aligned with your overall brand.

THE REAL CHALLENGE ADVISORS FACE

You became a financial advisor to serve clients, not to manage lending pages, LMSs, or digital campaigns. But without a strong online presence and consistent client journey, your risk being invisible.

- NO ONLINE PRESENCE**
Referrals and existing clients aren't enough anymore. With how crowded the financial services space is, clients can't find you or trust you.
- NOT BEING ADMIN STRONG**
Fiddling around with leads, confirming appointments, and tracking sales manually? That's time lost and opportunities missed.
- INCONSISTENT CLIENT EXPERIENCE**
Scattered emails, templates, and locking tools create confusion and erode trust with potential clients.
- NO BRAND ALIGNMENT**
Your messaging doesn't match your LinkedIn, Facebook, or website. That disconnect can hurt credibility and compliance.

COMPLETE YOUR REGISTRATION

Confirm your details to activate your HeyStudio Advisor platform and start building your branded digital presence for just R600/month.

First Name *
Last Name *
Phone *
Email *

Select a branch
Select a branch

By submitting this form, you agree to the R600/month HeyStudio Advisor Platform subscription and understand you shall be billed accordingly. You may cancel anytime with 30 days' notice. Your personal information is processed securely in compliance with account [POPIA policy](#).

COMPLETE ACCOUNT

Before you approve your Biography make sure you approve all of the below:

- ✓ Is your name and surname spelled correctly?
- ✓ Is your contact details correct?
- ✓ Is your address correct?
- ✓ Please check your educational details (if app)
- ✓ Is your working experience correct?
- ✓ Did you read through your content?
- ✓ Did you check the grammar and spelling?
- ✓ Please ensure your FSP details are correct!

First Name * Marko
Last Name * Jo Roux
Email * marko@heystudio.co.za

Do you approve your 90 word biography? *
 I approve
 I request a change

Do you approve your PDF Bio? *
 I approve
 I request a change

Any changes or feedback? Please include your changes [regards here](#)

Send Feedback

Personal Information

First Name *
Last Name *
Phone *
Email *

Date of birth
Date of birth

Your office address *
Office Address

City *
City

Postal code *
Postal Code

ADVISOR ONBOARDING PER BRANCH

attooh! Advisor onboarding process



Dear Alex,
Fantastic! Now that you have taken the first step, allow us to guide you through the process of creating your brand and explain what will happen on our end.
Please read through each STEP carefully and familiarise yourself with the different BRAND aspects and how we will be able to support you.

***STEP 1: YOUR PERSONAL BIOGRAPHY**
(SLA 72 working hours from receiving your info)

- Now that you have completed the online form, we will be able to create your personal biography.
- Once we have completed your Biography, you will receive an email to approve this.
- Please take a moment to carefully read through it and ensure that all your details are accurate.
- Keep in mind that we copy and paste your information exactly as provided.

***STEP 2: YOU WILL RECEIVE AN INVITE TO THE ATTOOH CRM TRAINING. (PLEASE KEEP AN EYE ON YOUR INBOX AND SPAM MAIL)**

The sooner you complete your about CRM training, the earlier the next phase of your digital journey will start. Don't delay your training, as this will delay your Digital Website and journey. You will not be able to gain access to the about CRM. If you're having trouble completing, and your Biography is not approved and completed.

NOTE: If you have not received the about CRM training email in your inbox and/or spam mail, please email 3006@heystudio.co.za

***STEP 3: DIGITAL PLATFORM SETUP**

Your Digital Brand Journey starts here!

Once we have received the notification that you and/or your Admin assistant have completed the about CRM training and your Biography has been approved/updated, then we will create the following Digital Platforms for you to use:

- Your Digital annual review landing page to be used for your current clients.
- Your Web landing page to be used to capture new leads.
- Your social media content strategy.
- A contact card (which is not intended to replace your digital card). This card will have a lead card that you can use to collect leads at events.
- Social Media Dashboard (learning soon)

These platforms will be directly connected to your Attooh CRM system, enabling you to manage and nurture your new leads and current clients efficiently.

***STEP 4: YOUR PERSONAL CORPORATE PROFILE**

Once all of the above has been completed, you will be able to order your Personalised Corporate profile. This will be personalised corporate profile producing yourself and your team members.

***STEP 5: YOUR PERSONAL WHATSAPP FEATURES**

For the looking for your personal design pack featuring your details. This pack can be used for WhatsApp or social media purposes.



Hi (contact first_name),
Welcome to your HeyStudio Advisor Platform - we're excited to have you on board! To get started, simply navigate to the left-hand menu and click on 'Help Guides'. This section gives you a step-by-step overview of everything you need to begin using your LMS effectively.



To get the most out of your Advisor LMS, your first step is setting up your Outlook or Gmail email and syncing your calendar. These two simple actions unlock the full power of the platform - enabling you to respond faster, book more meetings, and keep your brand front and centre in every interaction.

- Why This Matters**
- Connect Your Outlook or Gmail Email**
This is a vital first step. It allows the LMS to send automated email workflows, instantly respond to leads, and ensure that every message sent is professional, branded, and timely.
 - Sync Your Calendar for Smoother Appointment Scheduling**
No more back-and-forth. Events and prospects can book directly into your calendar based on your availability - saving time and increasing conversions.
 - Enable Google or Facebook Login**
Get fast, secure access to your LMS without remembering another password.
 - And More in the Help Guides**
Our built-in help guides show you how to customise your brand, manage leads, and run your advisory practice like a pro - all in one place. We've built this platform to be simple, intuitive, and powerful - anything you need to grow your brand, build credibility, and turn leads into long-term clients.
 - Coming Up Next**
You'll receive a follow-up email shortly with your personalised marketing pack - including ready-to-use social media templates, custom digital assets, and branded tools to kick off your marketing immediately.
 - SLA Notice**
Our delivery SLA is 5 working days from the date of this email.



If you need assistance, please navigate to the left-hand menu and click on "Request Support". Complete the form and submit your support ticket - our team will respond within our 72-hour SLA to help resolve your query.



Hi (contact first_name),
Your brand is your greatest asset in today's competitive financial services space. Clients are looking for credible, trustworthy advisors whom they want to get to know, like, and trust. Make sure you have a digital presence where they can find more information about you.
That's where HeyStudio Value Proposition comes in.

What is the HeyStudio Advisor Platform Lead Management System (LMS)?

The HeyStudio Advisor LMS platform is a fully managed financial advisor. This is over and above your creative digital personal brand in place.

It's more than just a tool; it's your digital business partner. It's designed to help you:

- Manage your online brand (with social media tools)
- Deliver a consistent client experience with actions
- Use as a communication tool to manage a clearly structured your practice to have a lead-nurturing
- Manage budget leads in one place
- Do POPM compliant when capturing new leads
- The platform does not require admin. Below is a lead management business tool. If you do not use your clients, new or existing, with your Advisor platform.

What is included in your R500 000 price?

Full Value
Hi (contact first_name),
Thank you for completing your sign-up to the HeyStudio Advisor Platform - we're excited to begin building your digital presence!

What to expect next?

Keep an eye on the next mailer, with the subject 'LET'S GO "Create Your Brand"'

Service level agreement and support turnaround

1. Working days from completing your 'Create your brand'
2. This is if your submitted information is correct and
3. This does not include the time you take to approve
4. 3 working days after your site is live, you will need
5. Your corporate profile will only be done once you are Representative.

Kind regards,



Hi (contact first_name),
Thank you for joining us on the exciting journey of building your personal brand. At HeyStudio, we believe that a strong, well-crafted brand sets the foundation for deeper client trust, professional recognition, and long-term success in the financial services industry.
To get started, you'll find four important steps below. Each one is designed to guide you through the process of creating a brand that truly reflects who you are and what you offer:

1. How to take your professional photo
Your photo becomes your brand icon. It's the first impression many clients will have of you. This quick guide will show you how to capture a clear, professional image that enhances your credibility and personal brand. No need to use a professional photographer; just follow the tips below and capture the perfect photo with your smartphone.

2. Personal Bio Preparation Guide
Your biography is where future clients begin to connect with your story. This guide will help you gather the right thoughts, achievements, and personal insights to craft a powerful bio that builds trust before the first meeting. Don't worry about this section; we have included ChatGPT prompts to help you get started. Now all you have to do is schedule time in your diary and get creative with your words.

3. Corporate Identity Form
Once you complete this form, our creative team at HeyStudio will start creating your brand's visual identity. Including your personal business cards, your corporate presentation packs, and our lead-generating web pages to help you attract and connect with new clients.

4. Lead Management system access
Once your site is live, you'll receive access to your own Lead Management System (LMS), an smart, automated platform designed to help you nurture leads, manage client communication, schedule appointments, and track your pipeline with ease.

WHY WAIT? LET'S GET STARTED!

SERVICE LEVEL AGREEMENT
From when you submit the form:

1. Working days if your information is correct and your photo is accepted.
2. This does not include the time you take to approve your Biography.
3. 3 working days after your site is live, you will receive your Personal pack.
4. Your corporate profile will only be done once you submit your complete brand profile.

Kind regards,
The HeyStudio Team



Dear (contact first_name),
This is an urgent request to approve your 90-word introduction of yourself and your Digital Biography.
Your prompt response will ensure a timely activation of your website. Thank you for your attention to this matter.
NOTE: Did you receive your invite to join the Attooh! Lead Management training platform, namely Learn Lounge. If not, did you check your junk mail? If not email, then please email 3006@heystudio.co.za

STEP 1: Proofread your 90 word introduction and Digital Biography

1.1 Please approve your 90-word introduction. We have copied and pasted information. Please read through it carefully and make sure you are happy! This will position you as "What you can offer the potential client! This will be on your website."

[[contact_adv_bio_002]]

1.2 Click on the link below to proofread your Digital Biography. Make sure ALL the data captured on this Biography.

[Click here to preview your Digital PDF Biography](#)

STEP 1: Proofread your 90-word introduction and Digital Biography

[Click here to submit your feedback here](#)

Please let us know if you have any questions or concerns about your order. We are always here to help.

Kind regards,



Dear (contact first_name),
Thank you for approving your biography. Our team will now finalise the layout of your website. Please allow 7 working days for your site to become active and live.



Hi (contact first_name),
Congratulations - you're all set up!
You've been successfully onboarded onto your very own Lead Management System (LMS), designed to help you work efficient, respond faster, and grow your business with confidence.

Here's what this means for you:

- Customise and manage your leads effortlessly
- Automate follow-ups and client communication
- View your entire sales pipeline in one place
- Real-time marketing and book-keeping activities
- Monitor your business performance in real time
- Keep your website in the lead will built-in visibility
- Personalised website that showcases your services and expertise
- Contact forms that feed directly into your LMS for instant follow-up
- Full-time discoverability to help clients find and engage with you easily

You're now equipped with a powerful, centralised system that streamlines your day-to-day operations, helps client engagement, and strengthens your personal brand.

[Download Website Testing Guide](#)

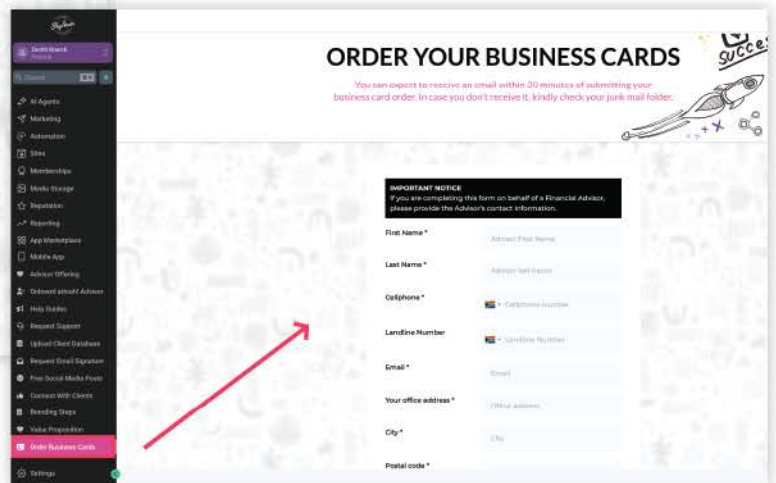
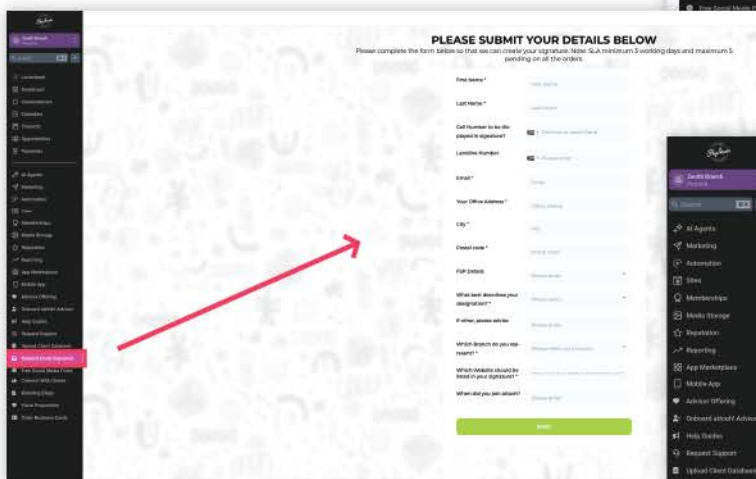
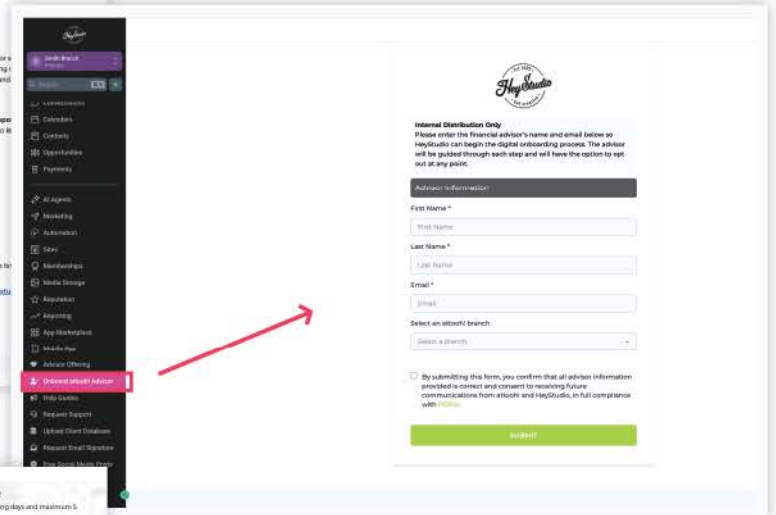
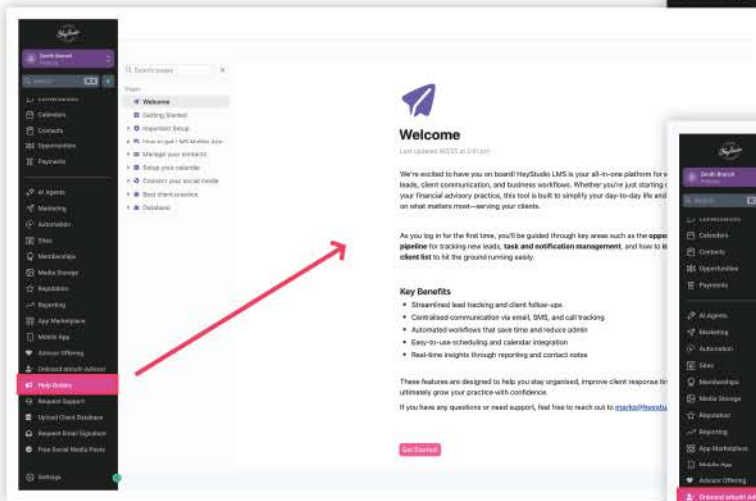
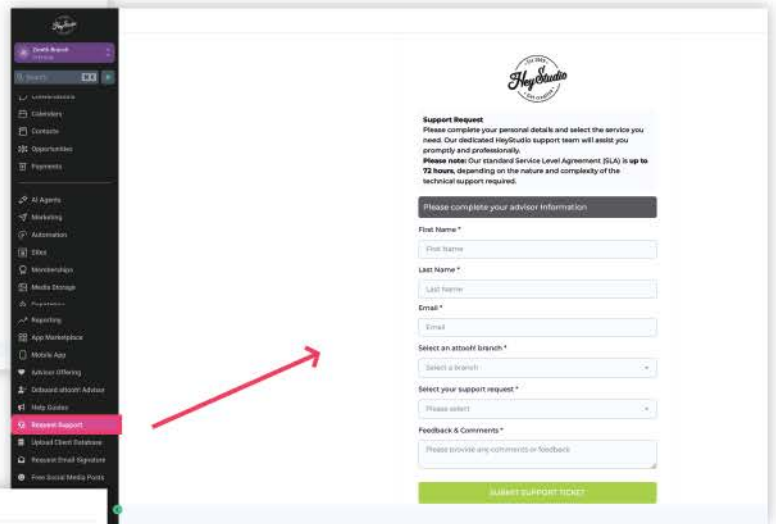
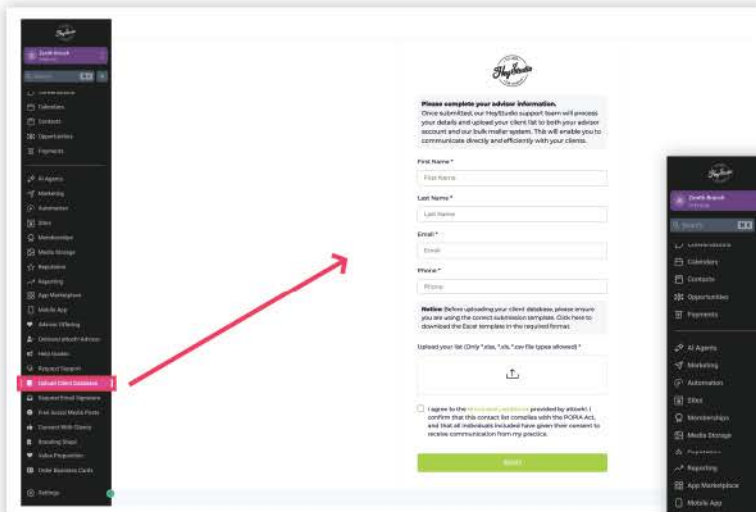
[Visit your website now!](#)

If you have any questions or need support, please go to your Dashboard and click on Request Support. (72 working hours SLA for responses)

Kind regards,



ADMINISTRATION SUPPORT WITHIN BRANCH

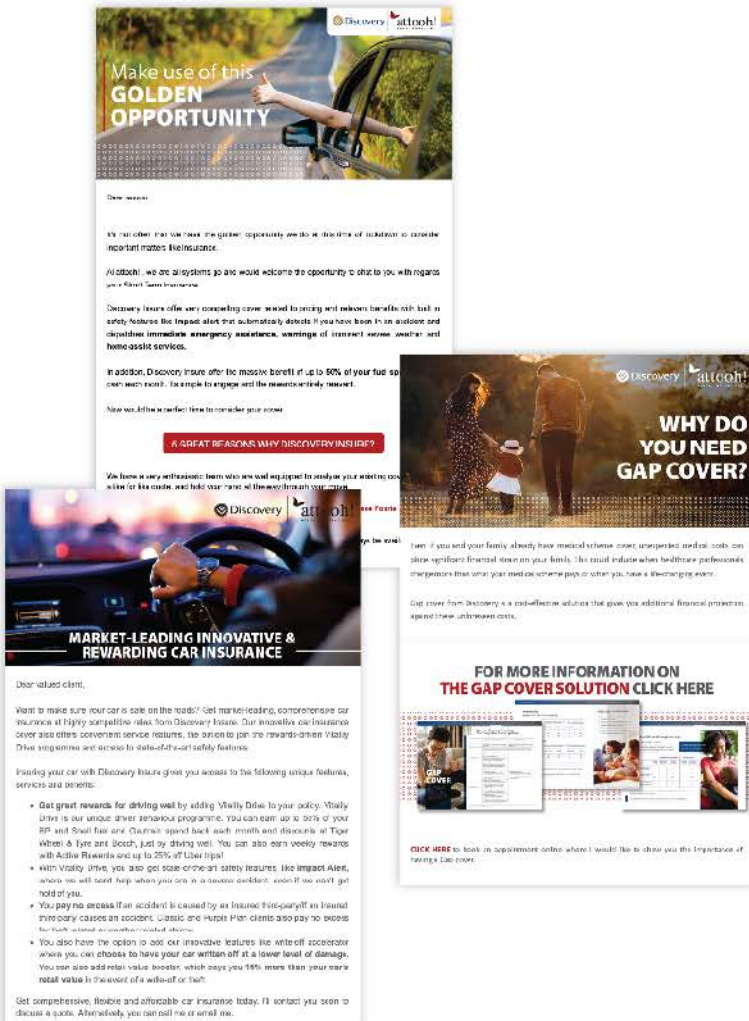


ADVISOR MAILERS

Pre-designed Mailers



Campaign Mailers



Newsletters



ADVISOR DOCUMENTS (DOC'S IN A BOX)

Financial 6 step planning document - Client / Advisor Feedback

Client

attooh!
HEALTH | WEALTH | LIFE

SIX STEP FINANCIAL PLANNING PROCESS

The Process Forward

attooh!
HEALTH | WEALTH | LIFE

Our 6 STEP PROCESS

DOES YOUR MONEY NEED A "PROFESSIONAL TRAINER"?

Financial planning is more than just putting numbers down on paper. It's about your life and what you want out of it. Do you understand where you are currently? Do you know your financial goal? How about the security of your family's future? Financial planning connects life with finance and evaluates the assets needed to make a dream come true. We use financial tools to help us learn about your goals so we can provide guidance for every step of your journey through this unpredictable life.

We provide an exceptional service and analysis process.

As one of my valued clients, my team and I will work with you to determine areas for development within your financial situation and to implement a number of practical initiatives to drive your finances successfully in to the future.

The process that we apply when dealing with you as our client can be broken down into six basic steps:

- 1 Initial Contact**
This is an opportunity for us to get to know each other and to establish a good working relationship. We'll be defining the scope of our engagement by:
 - Explaining the process we'll be following.
 - Identifying your needs and the level of advice required.
 - Being clear about what our responsibilities are, and how decisions will be made. We'll also need your consent to proceed.
- 2 Fact Finding**
We'll need some personal information from you in order to provide you with the best advice. This includes your current financial situation, commitments, and goals for the short to long term. We'll assess your objectives, concerns, and aspirations in order to understand your personal approach to financial planning and risk taking.
- 3 Data Analysis**
We will look at your financial situation and all the relevant factors based on the data we have. Then we'll develop strategies to meet your present needs and explore all available options so you can achieve your future dreams.
This will include reviewing you:
 - balance sheet (assets, liabilities and cash flow),
 - Current risk (assurances) portfolio,
 - retirement investments (discretionary and compulsory),
 - Last Will and Testament and Estate planning strategies.
 We will also obtain documentation from 3rd parties.
- 4 Recommendation**
Once your personal and financial information is analysed, a financial plan will be developed. This document lays out what recommendations and strategies should be put in place to help you meet your goals and objectives. It will look at your current financial status, as well as future prospects, and allocate assets, investments, liabilities and income accordingly. The plan will also include contingency planning for potential challenges.
The Financial Plan will enable a review of all aspects of your financial portfolio.
- 5 Implementation**
We will work with you to make sure you are comfortable with our recommendations, get your consent, and help complete all the necessary paperwork. You will be kept updated on the progress of all applications.
- 6 Review**
The final stage is about regularly reviewing your plan to make sure everything works for you. My team and I will look at any change in circumstances and, if necessary, change the plan to incorporate them. Reviews are typically done once a year, but can be more frequent if needed. This is also your chance to ask us any questions or raise any concerns you have.
This practice review is about making sure your plan really works for you, every step of the way. We believe that personal interaction is necessary in order to make this process work for you.

“ Every client is unique, so we tailor our process to fit each individual. We want to create a personalised financial solution that meets your needs and exceeds your expectations. I recommend what's best for you, based on what you want and need. I'm fully committed to your success - not just financially, but holistically as well. ”

Financial freedom could be your reality.

Advisor

attooh!
HEALTH | WEALTH | LIFE

SIX STEP FINANCIAL PLANNING PROCESS

Guidelines for Financial Advisors

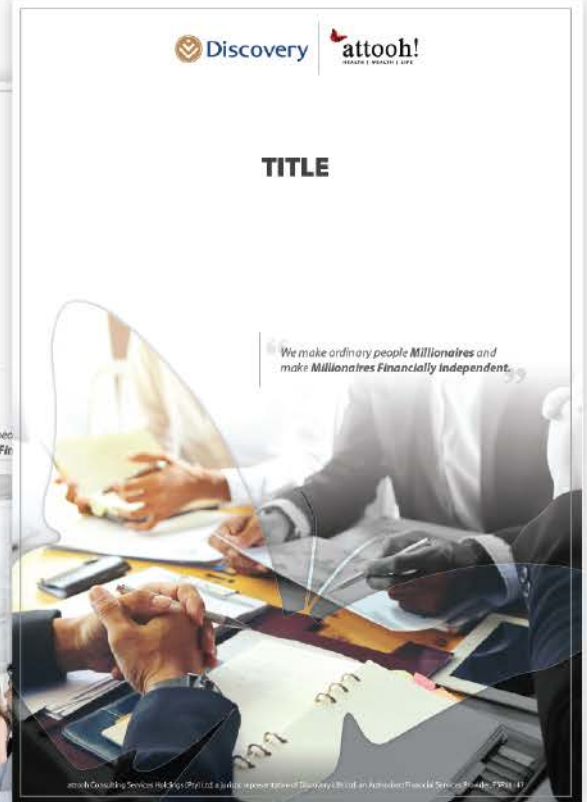
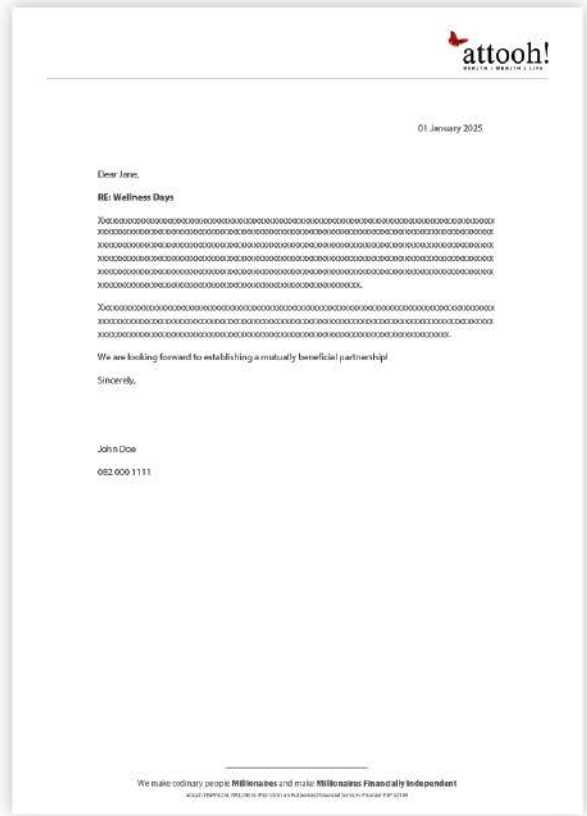
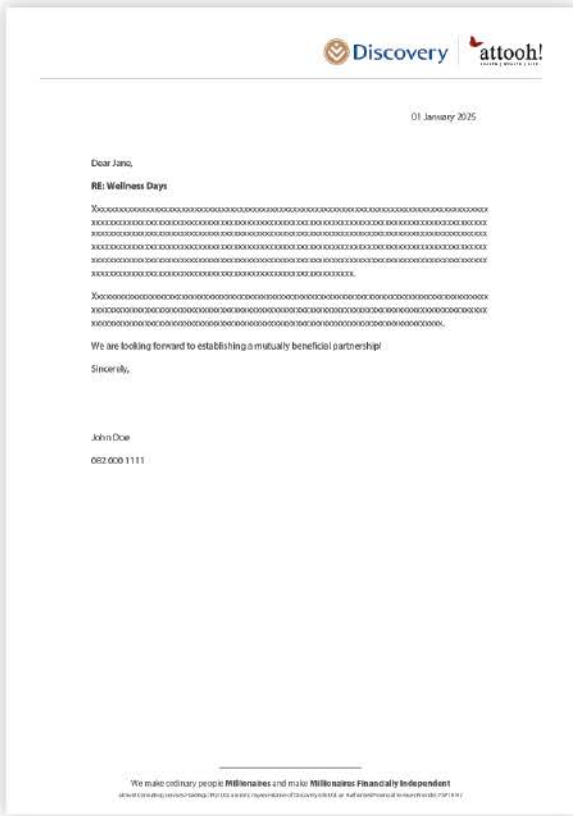
attooh!
HEALTH | WEALTH | LIFE

SIX STEP FINANCIAL PLANNING PROCESS

- 1 Establish and define a professional relationship**
 - Explain the financial process to a client.
 - Discuss who are you as a financial adviser.
 - Discuss the responsibilities of both the financial adviser and the client.
 - Define the scope of the engagement.
- 2 Gather clients information**
Identify clients personal objectives, financial goals and priorities.
Collect quantitative information such as:
 - Personal such as ID docs etc.
 - Income and expenses
 - Assets and liabilities
 - Health, tax, risk, retirement and estate details.**Collect qualitative information such as:**
 - Tolerance and attitude for risk
 - Attitude to spending and debt
 - Financial experience
 - Ability to save
- 3 Analyse and assess the client's financial status**
 - Information gathered is used to gain an understanding of the client's financial situation.
 - Assess the strengths and weaknesses of the clients current situation.
 - Identify risks or gaps in the client's portfolio.
 - Reviews are done in line with the clients personal objectives, financial goals and priorities.
- 4 Developing and presenting financial planning recommendations**
 - Make recommendations of a comprehensive financial plan for the client.
 - Ensure that clients understands purpose and reasoning of the recommendation.
 - Recommendations can change during this process, or at the least, be reviewed and altered based on the client's input.
- 5 Implement the financial planning recommendations**
 - Once the client has accepted the financial plan and agreed to the strategies and recommendations it is then implemented.
 - The use of professional judgement when recommending financial products are essential.
 - All decisions must be made in the best interest of the client.
 - Engage services of external providers such as attorneys, investment specialists may be needed to implement the financial plans.
- 6 Monitoring the financial planning recommendations and building a long term relationship with clients.**
 - This is a vital step.
 - The financial adviser and client should mutually define and agree on terms for reviewing and re-evaluating the client's situation.
 - Updates or changes to the financial strategies could be required.
 - This is an on going process.

ADVISOR DOCUMENTS (DOC'S IN A BOX)

GC and IFA - Cover page and memo pages



ADVISOR DOCUMENTS

Building blocks of your Financial plan

BUILDING BLOCKS OF YOUR FINANCIAL PLAN



Financial planning requires a detailed analysis of your personal and financial information, identifying your financial needs, prioritising these needs, and ensuring that products appropriate to your specific circumstances and risk profile are added to your portfolio.

1

Last Will

Start with the end in mind! A will helps you state your intentions for the distribution of your assets and wealth after your death. It is a legally prepared document to ensure that your loved ones are taken care of after you're gone.



2

Budgeting

Balancing your expenses with your income is key to financial success. The first rule towards financial wellbeing is to spend less than you earn and a budget provides the information to plan properly.



3

Debt Optimisation

More than 70% of South Africans are overindebted. Structuring debt repayment in the most efficient way possible is critical to creating long term wealth.



4

Life Cover

No one ever knows when life will take an unexpected turn, having life insurance in place is one of the simplest ways to provide for your loved ones, in case of such an event.



5

Disability

Permanent or temporary disability cover in case of a life changing event will provide protection against a potential capital or income shortfall.



6

Dread Disease

The impact of events, illnesses or disorders, such as heart attacks, cancer strokes and coronary artery bypass grafts, make up to 90% of dread disease claims. Having the right protection and solution should be an important element of all clients portfolio.



7

Health / Gap Insurance

A medical aid will financially protect you if you suddenly have to pay large, unexpected medical cost, whereas the Gap cover will cover the difference or shortfall between what your doctor charges and what your medical aid pays from the Risk or hospital benefit.



8

Short Term

Every client with assets such as a property, vehicle or personal possessions should protect his assets against a loss or damage which could have an impact on his financial wellbeing. Short term insurance provides such cover.



9

Savings

Reaching short to medium term financial goals is best achieved with a savings strategy by setting out specific targets and taking the necessary steps to achieve them: building up an emergency fund, planning a vacation, or saving for your child's education is typical examples.



10

Investment

This is a great way to make your money work for you and potentially grow your wealth. Investing may allow your money to outpace inflation and increase in value. The greater growth potential of investing is primarily due to the power of compounding and the risk-return trade-off.



11

Retirement

Ask yourself how much money do I need to save for retirement? This depends on how much you want to maintain your current lifestyle when you retire. Saving and investment strategies will allow retirement goals to be achieved.



12

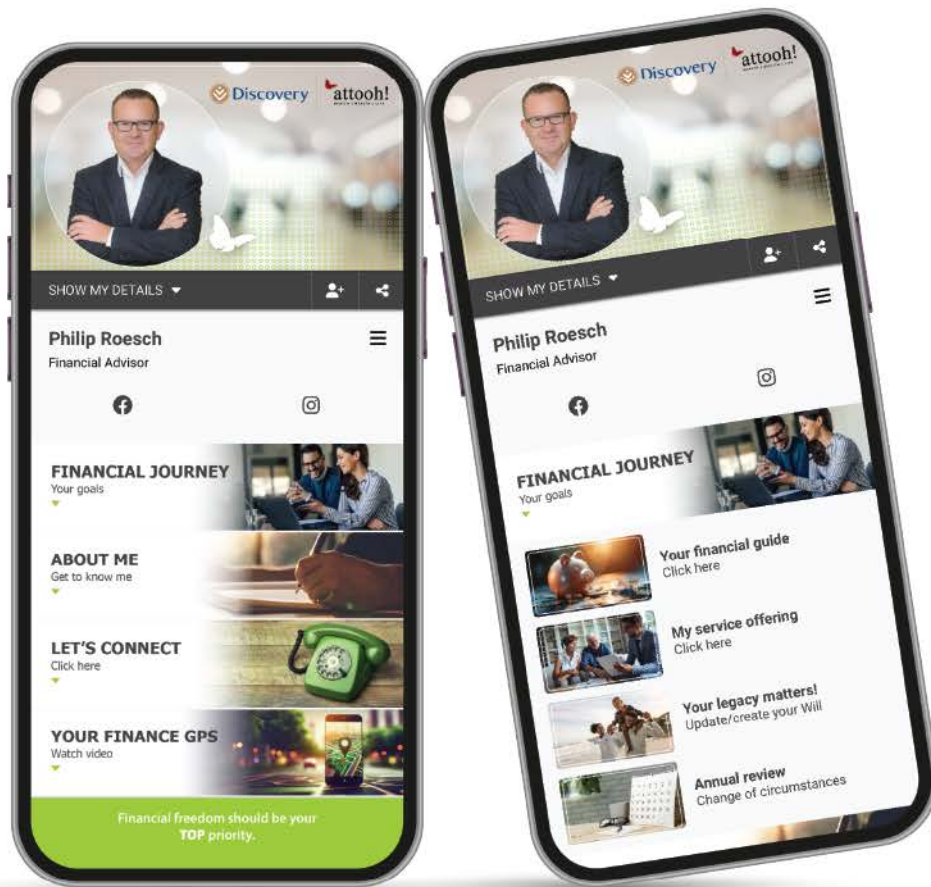
Tax & Estate Planning

Tax planning is the process of analysing your finances to find products and solutions to reduce your tax liability. Trusts are legal entities that protect the trustor's assets and ensure they are distributed according to the trustor's wishes.



ADVISOR DIGITAL BUSINESS CARD

Go digital with your personal digital business card *(Additional Cost)*



PRINTED BUSINESS CARDS

Be on the lookout for our emails to order new business cards. *(Additional Cost)*



ADVISOR STATIONARY

This is to be purchased



007 LIFE FILE
LEAVE A LEGACY FOR YOUR FAMILY

INDEX
YOUR 007 LIST - REQUIREMENTS ON DEATH

PERSONAL	ASSETS	LIABILITIES
1. Last Will & Testament 2. Trusts 3. Certified Documents 4. Marriage Certificate(s) 5. Birth Records / Life Insurance Policy 6. Divorce Order / Settlement Agreement (if applicable) 7. Beneficiaries / Co-Trustees 8. Digital Assets 9. Miscellaneous	1. Fixed Property 2. Bank Accounts 3. Vehicles / Motorcycle 4. Investments / Life / Share 5. Investments 6. Salary / Pensions / Provident Fund 7. Business Ownership / Contracts	1. Outstanding Debt 2. General 3. Funeral 4. Medical Aid 5. Miscellaneous

FINANCIAL PLANNING //
Finansiële Beplanning

When it comes to financial planning, there is no one-size-fits-all solution. Everyone's financial situation is different and unique.

POLICY SCHEDULE //
POLISSKEDULE

ASSETS UNDER MANAGEMENT //
BATES ONDER BESTUUR

“Whether you... or think you...”

“Your life does not get better by chance. It gets better by change.”

PERSONAL
PERSONOONLIK



EVERYTHING YOU NEED, ALL IN ONE **DIGITAL LIFE PACK**



Digital Life File, Contact List, Last and Final Letter. This is a fillable document and should be completed on desktop.



Client-facing Q&A card
generational advisory
practice test booklet

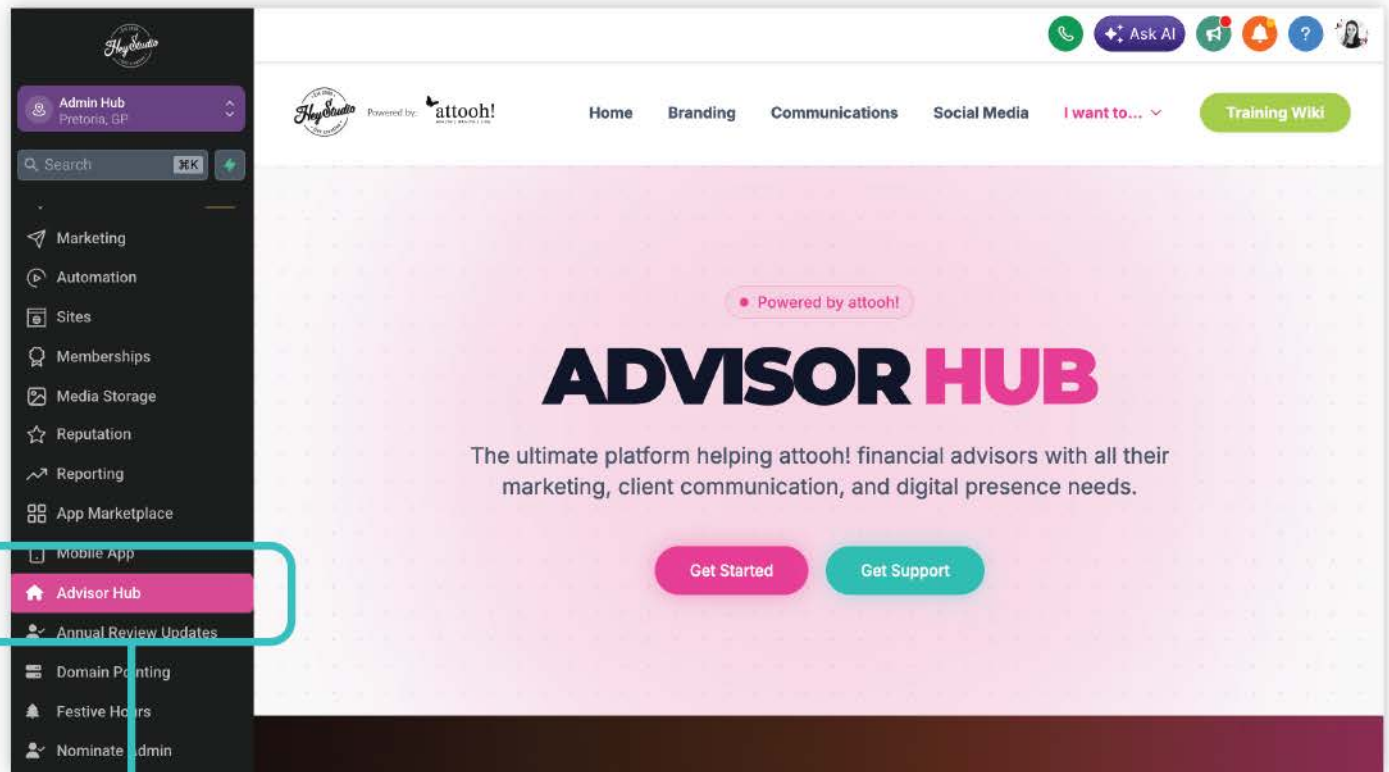
COMING SOON: GAP FAMILY & ADVISOR WORKBOOKS



Your Digital Life Pack is designed to grow with you and your client. We're continually enhancing these tools to make them more valuable and practical. Be sure to check back regularly for the latest updates and new versions.

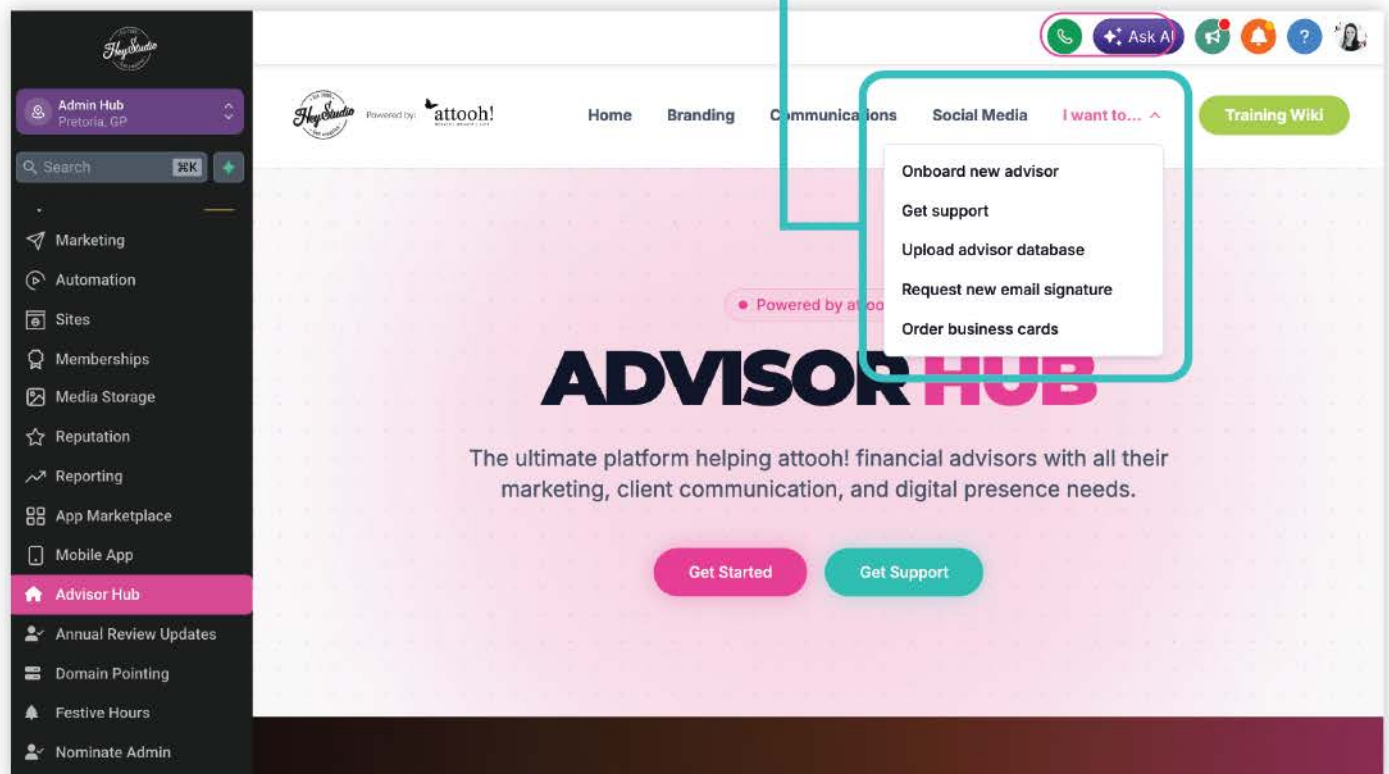
THE HEYSTUDIO / ADVISOR HUB

All your documents, downloads and training in one place.



Click on “Advisor Hub”
to open the page.

Click on “I want to...” for a
range of options we offer.



THE HEYSTUDIO / ADVISOR HUB

All your documents, downloads and training in one place.

The screenshot displays the HeyStudio Hub Training Wiki interface. On the left is a dark sidebar with a navigation menu including: Admin Hub (Pretoria, GP), Search, Marketing, Automation, Sites, Memberships, Media Storage, Reputation, Reporting, App Marketplace, Mobile App, **Advisor Hub** (highlighted), Annual Review Updates, Domain Pointing, Festive Hours, and Nominate Admin. The main content area features a top navigation bar with 'Home', 'Branding', 'Communications', 'Social Media', 'I want to...', and a 'Training Wiki' button. Below this is a 'HeyStudio Hub Documentation' link and a large 'TRAINING WIKI' heading. A sub-heading reads: 'Your comprehensive guide to mastering the HeyStudio Hub. Search for topics, watch training videos, and read detailed documentation.' A search bar contains the text 'Search documentation (e.g. Calendar, Contacts)...'. A left-hand menu lists categories: 'GETTING STARTED' (with sub-items: Overview of the HeyStudio Hub, Training Videos), 'DASHBOARD & SETUP' (with sub-items: Email Signature & QR Code, Manage HeyStudio Hub From Cellph...), and 'CALENDAR & MEETINGS' (with sub-items: Connect Your Outlook Calendar, No-Calendar Setup, Connect Video Conferencing, Set Calendar Availability, Schedule an Online Meeting, Managing Appointments & Deadlines). The main content area features an article titled 'Overview of the HeyStudio Hub' with the text: 'We're excited to have you on board! The HeyStudio Hub is your all-in-one platform for easily managing leads, client communication, and business workflows. Whether you're just starting or scaling your financial advisory practice, this tool is built to simplify your day-to-day life and help you focus on what matters most: serving your clients.' Below the article are two callout boxes: 'Included in Your Fee' (stating the platform adds value to the R600-per-month fee) and 'Important Note' (stating the platform is not replacing Advisor 360, Shared Drive, @work, or compliance processes). A 'Back to Top' button is visible at the bottom right of the article area.

THE HEYSTUDIO / ADVISOR HUB

All your documents, downloads and training in one place.

WHY PERSONAL BRANDING MATTERS

Maintaining a consistent advisor brand is essential to building lasting trust with your clients. It goes beyond a striking logo; it's about presenting a unified, professional image across all platforms that proudly promotes the attoohi values and reinforces your credibility in the financial sector.

- Be Memorable** Personal branding is the means by which people remember you. It's how you stand out from the competition.
- Build Trust** Clients will start recognizing your brand once they've experienced consistent, reliable, meaningful consistency.
- Ensure Consistency** Keeping your overall image and appearance the same across platforms shows professionalism and reliability.

BRANDING

Take the steps to establish your credibility and attract new clients. A personalised website is the cornerstone of your online brand.

- YOUR BRAND**
Be professional in everything you do. Remember, a client does business with those they know, like, and trust.
[Request a Profile](#)
- BRAND PROFILES**
Capture your individuality and expertise to create a brand that resonates with you and offers consistency.
[Request a Profile](#)
- BRAND AMBASSADOR**
Welcome to the attoohi family. Help us protect the brand at all times and ensure the correct elements are used.
[Request a Profile](#)
- PROMO MATERIAL**
If you have an event and need promotional merchandise, we've got your back. Let us help you create it!
[Request a Profile](#)
- BUSINESS CARDS**
Advisors can order printed business cards every 3 months.
[Request a Profile](#)
- EMAIL SIGNATURES**
Request a brand new email signature to ensure your communications remain professional and compliant.
[Request a Profile](#)
- SOCIAL SETUP**
Connect your social media platforms to your HeyStudio Hub to start posting directly.
[Request a Profile](#)

YOUR DIGITAL CARD

Keep your clients connected to your practice by having your details on their phones at all times. Generate leads through referrals from friends and family. Send your digital card to your clients, which includes a free QR link for easy sharing.

- Digital Profile** Share your details instantly and stay ahead on your client's phone.
- Financial Services** Keep your essential services and contact details at your client's fingertips 24/7.
- Lead Generation** Offer referrals and offer new prospects directly into your HeyStudio Hub.
- Annual Reviews** Drive directly from your digital card to keep clients updated seamlessly.

COMMUNICATIONS

Staying connected with your clients is essential to building a strong and successful advisory business.

- ADVISOR PERSONAL PACK**
Download your personally designed pack of adverts. Use these via WhatsApp, social media, or print.
[Request a Profile](#)
- ADVISOR DATABASE**
To send annual reviews or newsletters, such as the Squarewave, advisors must submit their client databases.
[Request a Profile](#)
- PRESENTATIONS**
Download the generic PowerPoint template and attoohi fonts to present professionally.
[Request a Profile](#)

DOC'S IN A BOX

Ensure the documentation and stationery you use are the most recently updated versions.

- [Request a Profile](#)
- [Request a Profile](#)
- [Request a Profile](#)
- [Request a Profile](#)

DIGITAL BACKGROUNDS

Download personalized digital backgrounds to use during your online meetings.

- [Request a Profile](#)
- [Request a Profile](#)

SOCIAL MEDIA DOWNLOADS

Our social media posts match the big holidays and special days throughout the year. Download them early to plan ahead!

What's New: Social Calendar Days

FEBRUARY

February's social media posts are ready for you to use! We've created ready-to-go captions with engaging images to keep your social media active and engaging. These "food good" posts help you stay visible, connect with clients, and align with public holidays and fun themes throughout the year, not just financial content. A new set of posts will be available every month, so keep an eye out for them coming soon.

This month, we highlight:

- [Request a Profile](#)
- [Request a Profile](#)
- [Request a Profile](#)
- [Request a Profile](#)

GETTING STARTED IS SIMPLE

- Download the highlighted post files.
- Download the Captions to accompany the post social sheet. Each row includes a link/caption and the corresponding image.
- Post the image together with the caption on your social media platform of choice.
- These can also be shared via WhatsApp, Facebook, and Instagram.

That's it. Consistent presence, made easy.
Stay visible. Stay relevant. Stay top of mind.

Pre-Designed Social Media Posts

- [Request a Profile](#)
- [Request a Profile](#)
- [Request a Profile](#)
- [Request a Profile](#)

MEET OUR CREATIVE TEAM

- Lizelle Schoeman** - Head of Brand & Marketing
For 12 years, I've been an integral part of the attoohi Creative team, turning ideas into action. I thrive on creating solutions and nurturing brand growth for our financial advisors. As brand guardian, my ultimate passion is protecting and elevating your brand.
- Jenna Nürberger** - Senior Graphic Designer
My creative journey began with photography over 15 years ago before my love for design took centre stage. As a senior graphic designer, I create visually compelling designs that perfectly align with the attoohi brand identity to deliver a memorable experience for your clients.
- Tanya Liebenberg** - Design Coordinator
Since joining in 2017, I've grown from administrative to handling advisor websites and internal communications. I love working in our dynamic team and making a real difference. I'm always energetic, eager to learn new skills, and ready to assist with design projects.
- Marko Le Roux** - CRM Administrator & Support
With a BCom in Marketing and Organizational Psychology, I bring a blend of marketing insight and technical expertise to HeyStudio. I focus on digital automation, CRM systems, and workflow optimization to build scalable solutions, bringing curiosity and clarity to every project.

HELP & SUPPORT CENTER

Signup a new advisor, get technical support, update your client database, manage your email signature, or order printed business cards.

- [Request a Profile](#)
- [Request a Profile](#)
- [Request a Profile](#)
- [Request a Profile](#)

OPERATIONS OR ADMIN STAFF:

Please enter the correct financial advisor details so HeyStudio can begin the digital onboarding process. The editor will be passed through each step and will have the option to opt out at any point.

First Name *

Last Name *

Email *

Select an attoohi branch

By submitting this form, you confirm that the advisor's information provided is correct and consent to receiving future communications from attoohi and HeyStudio, in full compliance with FICPA.

[Request a Profile](#)