

# MARK STIDWORTHY

## Financial Advisor

With 20 years of experience in the financial services industry, I am a highly driven professional dedicated to helping individuals and businesses achieve financial security and growth. My expertise spans Life Insurance, Short-Term Insurance, Investments, Pre- & Post-Retirement Planning, Medical Aid, Estate Planning, and Employee Benefits. I take pride in delivering bespoke financial solutions that align with your unique goals while ensuring full compliance with industry regulations and best practices.

As a qualified Financial Adviser, I apply the six-step financial planning process establishing client relationships, gathering financial data, analyzing needs, developing strategies, implementing recommendations, and conducting ongoing reviews. This structured approach ensures that you will receive a comprehensive, tailored advice to protect and grow your wealth effectively. My strong communication and interpersonal skills allow me to simplify complex financial concepts, build trust, and lend guidance through critical decisions even in high-pressure situations.

Beyond individual financial planning, I bring strategic leadership to business operations, ensuring efficiency, compliance, and sustainable growth for you my client. Whether working with private clients or overseeing financial practices, I remain committed to integrity, professionalism, and long-term success.

I believe that your financial well-being is the foundation of a secure future, and I am passionate about empowering my clients with the knowledge and strategies they need to thrive.

Let's connect to discuss how we can turn your financial aspirations into reality.

*Mark Stidworthy*

Financial Advisor



## CONTACT

### Website

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c/o Sloane & Harrison Avenue  
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## QUALIFICATIONS

National Certificate Wealth  
Management



## BUSINESS EXPERIENCE

Standard Bank | Business Manager |  
2005 - 2010

Standard Bank | Financial Advisor |  
2010 - 2012

ABSA | Financial Advisor | 2012 - 2014

Consult by Momentum | Financial  
Advisor / Franchise Principal | 2015 -  
2025



# 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



### 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".