

MONIQUE O'REILLY

Financial Advisor

Introducing the Financial Advisor Who Transforms Lives

Welcome! I am honoured to meet you. My name is Monique O'Reilly, and I am a Financial Advisor proudly affiliated with the esteemed attooh! Group of Companies. As a member of this award-winning Financial Advisor Group, which boasts a national footprint, I specialize in offering a comprehensive range of corporate and individual financial services. At attooh!, our passion lies in crafting tailor-made financial plans, delivering personalized financial education packages, and nurturing lifelong relationships. I firmly believe that having a dedicated financial advisor on your team is crucial to achieving personal and family financial success.

When you become acquainted with our brand, you'll notice our distinctive butterfly icon. This butterfly symbolizes metamorphosis and change—a concept we must embrace, as change is inevitable. Personally, I relate to this company icon as I believe in the transformative power of dynamic change and continuous improvement, both in my life and yours. My mission is to help my clients foster a growth mindset, facilitating a metamorphosis that transforms their financial lives. This ethos aligns perfectly with our company motto: "We make ordinary people Millionaires and make Millionaires Financially Independent." With my qualifications, experience, and exceptional support staff, I am confident in my ability to guide clients towards financial independence and Millionaire status by implementing holistic, personalized plans that align with their financial goals and aspirations.

Allow me to provide a glimpse into my background:

With a wealth of experience in the Financial Advisory field, I have been an active industry professional since 2008. Throughout my career, I have had the privilege of working with prestigious companies like Old Mutual and ABSA Brokers, constantly evolving my knowledge and skill set. To ensure that I stay at the forefront of industry development, I regularly attend training seminars, remain abreast of industry changes, and cultivate a genuine curiosity about what's happening around me. I obtained my NQF 5 Wealth Management qualification in 2017. I hold a deep commitment to adding ongoing value to my clients and their businesses, which is why I diligently stay up-to-date on legislation, taxation, products, practices, and industry news.

Why should you entrust me with your financial journey?

By offering tailor-made packages and providing personalized service, I empower my clients to turn their financial dreams into reality. Throughout our partnership, my aim is to add value not only to their financial experience but also to their lives as we progress through the evolution of their financial status. In an uncertain economic climate, I understand the importance of maintaining a hands-on approach to safeguard my clients and their businesses from anticipated and unexpected changes. It is crucial for all of us to leverage the expertise available to us and not struggle alone. That's precisely why we have developed this highly personalized service—to guide and support you on your unique journey.

With the unwavering support of attooh!, I am thrilled to accompany my clients on their personal financial metamorphosis, enabling them to unlock their full potential and achieve remarkable financial success. A quote I live by is, "Be the best you can be for yourself and your family."

Please feel free to contact me to embark on this transformative journey together.

Monique O'Reilly
Financial Advisor



CONTACT

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QUALIFICATIONS

RE 5, NQF 5 in Wealth Management



BUSINESS EXPERIENCE

ABSA Bank | Receptionist | 2004

ABSA Brokers | Brokers Assistant | 2007

Old Mutual PFA | Financial Advisor and
Sales Manager | 2013 - 2020

Old Mutual AFD | Financial Advisor
and Sales Manager | 2020 - 2025



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



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".