

BAREND J NEL

Financial Planner and Investment Specialist

Dear reader.

With over 25 years of leadership experience across financial services, investment, and advisory disciplines, I have built a career centered on integrity, professionalism, and client-focused outcomes. My strength lies in transforming complex financial concepts into practical, FAIS-compliant solutions that protect, grow, and sustain client wealth.

My journey began at Smollan Holdings (Tiger Brands Group) in 2000, progressing through senior management roles in Universal Capital Systems (UCS), where I gained exposure to finance, IT integration, and corporate governance. In 2012, I founded Independent Stockbroking Solutions, a pioneering retail trading and market-education platform for South African investors.

Since 2016, I have served as a Financial Advisor and Planner at Attooh Financial Services, developing a trusted client base that includes both private individuals and major corporate accounts such as Vodacom, Harmony, and KFC. My work integrates FAIS-aligned holistic financial planning, encompassing investment, risk, tax, and estate strategies.

Guided by the principle of Luke 16:10 — “Whoever can be trusted with very little can also be trusted with much” — I lead with integrity, respect, and accountability. I view every client engagement as a stewardship opportunity to create clarity, care, and control in their financial future.

Ben Nel
Financial Advisor



CONTACT

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QUALIFICATIONS

- Postgraduate Diploma in Financial Law (NQF 8) - University of the Free State
- Higher Certificate in Financial Planning (NQF 6) – Milpark Education
- National Certificate: Wealth Management (NQF 5) – Integrity Academy
- Certificate in Wealth Management (NQF 4) – Integrity Academy
- Certificate in Entrepreneurial Skills (NQF 4) – Potchefstroom University
- Regulatory Exams: RE 1 & RE 5 – Moonstone Compliance



BUSINESS EXPERIENCE

Smollan Holding

Universal Capital Systems

Independent Stockbroking Solutions

attooh! Financial Services



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



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.**



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".