



Hi,
I'm Okkie Britz



Thank you in advance for placing your trust in me to look into your financial affairs. As one of Liberty's top financial advisers I am committed to ensuring my clients and their families are equipped with the right mindsets to enable their own financial success. This is my mission.

About Me

I am an Executive Financial Adviser of the Liberty Group Ltd.

I'm a qualified B Ed graduate with a Post Graduate Diploma in Financial Planning.

It is my job to make your finances work for you, so let's get started!

WHAT I CAN OFFER YOU

Investments

Short & Long -
term Insurance

Retirement
Planning

Wills and Trusts

Medical Aid

Wealth protection
and creation

We will discuss your financial and lifestyle goals, short, medium and long term. We will analyze your current financial status i.e. income, expenses and investments to determine the best route to financial stability and wealth creation.

To ensure the best utilization of your time during our first meeting, please bring the following with you:

1. Your payslip
2. Your expenses i.e. credit card debts, loans, car and house repayments, monthly expenses etc.
3. Pension and/ or provident fund benefit statements
4. Insurance policies

During
Our
First
Meeting:

Contact me on 072 783 3724 or okkie@allgen.co.za for any questions you have about our meeting.

Looking forward to meeting you.