

BHUPESH NATHOO

Financial Advisor

I am a Financial advisor affiliated with the attooh! Group of Companies, which delivers tailor-made and diversified financial planning solutions to individuals and corporate companies on a national scale.

The combination of my personal background, experience and qualifications enables me to provide you with expert financial advice and Intermediary Service. My objective is to guide you through your financial journey and to add considerable value to you and your company's financial wellness. With the assistance of my proficient team of support staff, I am able to assist you in implementing a holistic, personalised plan to achieve your financial goals.

In support of my belief that knowledge is power, I continue to keep up to date with the latest changes in legislation, taxation, products, practices and industry news. I don't believe in merely selling products to my clients, but rather I focus on creating and implementing a financial solution that is best suited to them, based on their current financial needs and wants.

I strive to provide my clients with the tools required to assist them in reaching their financial goals, allowing their idea of financial freedom to become a reality. I understand that in this volatile economic environment, it is important to stay focused, knowledgeable, and goal-orientated within every aspect of my client's financial portfolio. My objective is to guide you, my client, to financial success

Along with attooh!, I believe that success is based on the fundamental principle of adding value to the life of my client, which is why I am passionate about guiding you through your financial journey, helping you to achieve your financial potential and ensuring that you reach your future financial success. *The only source of knowledge is experience. - Albert Einstein*



CONTACT

Website

www.bhupeshnathoo.co.za

Email Address

bhupesh.nathoo@attooh.co.za

Mobile // Office Number

+27(0) 82 452 3047 //

+27(0) 31 309 7263

Physical Address

1st floor, LBB House, 15 Solstice Road, Umhlanga, Durban



QUALIFICATIONS

Wealth Management | *Inseta, 2018*



BUSINESS EXPERIENCE

PLM Brokers | *16 years*

attooh! | *current*



DOES YOUR MONEY NEED A “PROFESSIONAL TRAINER”?

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

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 lines



FIDUCIARY

- Wills and Estate
- Trusts



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".