Eben Jacobs

Financial Advisor

ABOUT **ME**

Eben Jacobs is a Financial Advisor affiliated with attooh Financial Wellness (PTY) LTD, specialising in Life and Disability Assurance, Risk Planning, Investment Savings and Planning, Healthcare Planning, Pre- and Post-retirement Planning, Short-term Insurance, Discovery Insure, Corporate Employee Benefits, Wellness and Vitality benefits, Corporate Benefits, Income Tax advice and Investment management."

Eben started with Sanlam in Bloemfontein on the 1st August 1984 as a Sanlam representative. He completed all the relevant Sanlam in-house courses, including the Sanlam Senior Advisers course within eight months. Eben became a Sanlam Branch Manager on the 1st January 1986 until he resigned and became an Independent Broker on the 1st September 1993.

At the end of 1992, Eben did all the ILPA exams and became a Fellow of The Institute of Life and Pension Advisors. (FILPA). Nowadays called CFP. Eben remained a Broker and running his own Independent Brokerage until he moved to Somerset West.

When the Life side of Discovery was established in 2000, he moved over to Discovery, selling mainly Discovery products until today. After moving to Somerset West, Eben took a sabbatical for close to two years. In 2012, he joined Absa Private Bank Stellenbosch for nearly two years.

Eben joined Discovery Financial Consultants, (DFC) Helderberg in 2014 and after five years as a Discovery Financial Consultant, he requested to be moved to attooh!.

"The combination of my personal background, experience and qualifications enables me to provide expert financial advice, and along with my proficient team of support staff, I am able to assist you in the implementation of a holistic, personal plan to achieve your financial goals, providing valuable knowledge and guidance along your journey to financial wellness."

"I, Eben Jacobs, have taken and used the lessons learned and taught on "The 7 Cures for a Lean Purse" from a work called: The Richest Man in Babylon by George S. Clason.

The 7 Cures are:

1). Start thy Purse to Fattening
2). Control thy Expenditures
3). Make thy Gold multiply
4). Guard thy Treasures from Loss
5). Make of thy Dwelling a Profitable Investment
6). Insure a Future Income
7). Increase thy Ability to Earn

"I do not merely sell products to my clients; I create and implement a financial solution that is best suited to them based on their current financial needs and wants. I provide them with the tools that they require to place them in a better position than what they were in before, so that the idea of reaching their financial goals becomes a reality."

"Eben Jacobs understands that in this volatile economic environment, it is important to stay focused, knowledgeable, and goal-orientated within every aspect of your financial portfolio. His objective is to guide clients to financial success, by protecting their dependents, and businesses and employees, from unexpected life events, adding value to their journey to financial freedom."

"In association with the attooh! Group of Companies and with a proficient team of support staff, Eben offers an expert hand in the planning of his clients' financial future, and is passionate about guiding clients in their financial potential, ensuring their future financial success!"

"I strive to continuously improve my skills and knowledge, in all aspects relating to the services and products that I advise on. To ensure that I offer the very best financial solutions that are seamless and deliver on their promises. To ensure that I am aware of the latest legislative changes and industry practices, ensuring that my clients continually receive the personalised solutions, and reap the rewards of being a Discovery client and benefiting from their dynamic product range and innovative reward structure."

CONTACT **DETAILS**

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ABOUT ATTOOH!

As a Boutique firm we specialise in value-added solutions that incorporates the financial advisory process with a focus on dedicated and tailor-made client education packages. We cover the full spectrum of financial services products and each client's ability to interact with us from cradle to grave.

Corporate dinosaurs boast about the number of years they have been around and the number of clients that they have on their books.

What matters most is an intimate entrepreneurial approach, in partnership with clients, to provide them with tailor-made service solutions and offerings that they appreciate, understand and value.

At attooh! we have a corporate view with an individual focus. Our Core Purpose is to empower individuals, at all levels of the economic spectrum, with solutions - not just products.

CORE SERVICES

RISK PLANNING

- Life cover.
- Disability Protection.
- Dread Disease cover.
- Physical and Functional impairment.
- Income Protection.
- Death / Disability Premium waiver.
- Funeral Cover.

HEALTHCARE PLANNING

- Medical aid cover.
- From hospital plans to comprehensive medical aid.
- Gap cover and Health Plan protector .

INVESTMENT PLANNING

- Flexible investments (no term)
- Unit trusts
- Endowments (5 or 10 year plans)

RETIREMENT PLANNING

- Retirement Annuities.
- Pension / Provident Preservation plans.
- Living annuities, Fixed interest Annuities and Income plans.

ADDITIONAL SERVICES

EDUCATION

- Education Protectors and Savings plans.
- "The Ordinary Millionaire" is a set of financial literacy training programs that focus on providing education, guidance and coaching that empowers individuals to take control of their financial situation.

EMPLOYEE BENEFITS

- Group Risk Benefits.
- Pension and Provident fund Consulting.
- Specialist representatives Nationwide
- A dedicated Fund Consultant and administrative person will be allocated to your company.

BUSINESS PLANNING

- Buy & Sell arrangements.
- Key person cover.
- Contingent liability.
- Loan account, overdraft, surety insurance and business overheads protector.

SHORT-TERM INSURANCE

- **Personal lines:**
  Home owners.
  House hold and vehicle insurance.
- **Commercial:**
  Cover for businesses.

ESTATE PLANNING

- Wills.
- Trusts.
- Executor services for winding up deceased estates.
- Protection Plans to protect your Estate against Excecutor, Conveyance and Trustee fees.

ASSET CONSULTING

- Assist retirement fund members to achieve better outcomes at retirement.
- Retirement fund investment strategy development, adoption and implementation.
- Board and member investment education and communication.