RANI **PILLAY**

Financial Advisor

I am a Financial Advisor affiliated with the attooh! Group of Companies, who deliver tailor-made and diversified financial planning solutions to individuals and companies nationally. I specialise in Risk, Retirement and Investments, including Offshore Investments, Discovery Insure, Health Assurance & Education Protection.

My objective is to guide you through your financial journey and to add considerable value to you and your family's financial wellness. In this volatile economic environment, it is very important to stay focused, not only in every aspect of your personal financial portfolio, but also about protecting you and your family, your business and employees, life changing events and challenges, whether expected or unexpected.

I continue to attend Continuous Professional Development courses (CPD). I believe that knowledge is power and therefore continuously strive to improve my skills in all aspects relating to the services and products which I advise on, always making sure that I offer the best solutions to my clients. I continue to keep up to date with the latest changes in legislation, taxation, products and industry news.

Together with the assistance of Discovery's Proficient Support Team, I am also able to assist with Group Risk Benefits, Wills, Business Assurance Solutions – Drafting of Buy and Sell Agreements, Key Person's Assurance and Contingent Liability Cover.

I have been associated with the Financial & Intermediary Services Industry for 38 years. I have worked for some of the most prestigious insurance companies. These companies have utilised highly influential training systems which is the foundation of my success as a Financial Advisor. The combination of my personal background, experience and qualifications enable me to provide you with expert Financial Advice and Intermediary Services.

My affiliation with the Discovery Group allows my clients to continually receive personalised solutions they desire, as well as to reap the rewards of being a Discovery client and benefitting from Discovery's dynamic product range and innovative rewards structure.

BUSINESS EXPERIENCE

Financial Advisor | Discovery GC - attooh! | *April 2019 – Present*

Financial Advisor | Discovery Financial Consultants | *Dec 2010 – March 2019*

Financial Advisor | Wealth Planner, ABSA Private Bank / Barclays Wealth | *2005 - Nov 2010*

Financial Advisor | Own Practice | *June 2003 - end Dec 2004*

Business Consultant | Discovery Consulting Services | *2000 – 2003*

Business Consultant | Commercial Union Life | *1992 – 2000*

Broker Liaison Officer | Sales Consultant, Momentum Life | *1989 - 1992*

Actuarial Clerk | New Business Manager, Crusader Life | *1985 – 1989*

Broker | Sentry Life | *1981 – 1983*

Claims Clerk | MCI Medical Scheme | *1980 – 1981*

CONTACT

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Boskruin View Office Park, Girdwood Avenue, Randburg

QUALIFICATIONS

Registered Financial Planner - Wealth Management, FPI | *2004 – 2007 FSB*

Regulatory Exam (RE 1) | Moonstone | *2012*

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".