

# RIAAN FRANZSEN

## *Financial Advisor*

Riaan Franzsen is a Financial adviser affiliated with attooh specialising in Life and Disability Assurance, Risk Planning, Investment Savings and Planning, Pre- and Post-retirement Planning, Short-term Insurance, Discovery Insure, Wellness and Vitality benefits and Investment management.

The combination of my personal background, experience, 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 dreams, providing valuable knowledge and guidance along your journey to financial wellness. Riaan started in the financial industry with Old Mutual, Brightrock and ultimately Discovery. I do not sell products to my clients; I create and implement a financial solution that is best suited to them based on their current financial goals and dreams. 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 dreams becomes a reality.

Riaan 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 dependants and businesses 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, Riaan 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, and 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

### Website

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## BUSINESS EXPERIENCE

Old Mutual | 2015

Brightrock | 2015

Discovery | 2016 - present



# 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".