

# ROSS MCLAREN

## Financial Planner

I am a Registered Financial Planner (RFP) and a proud member attooh! Group of Companies specialising in:

- Risk Planning
- Pre & Post Retirement Planning
- Investment Planning
- Business Assurance Planning
- Implementation of Corporate Benefits - Estate Planning
- Income Tax Advice
- Medical Aid / Vitality
- Short Term Insurance

I gained my product specific knowledge in this field at Discovery Head office, Sandton where I was trained in their high-performance centre. I am a versatile, open minded Financial Planner tied to Discovery alone as I believe strongly in their products. Over the last three years, I have enjoyed a successful journey with Discovery and foresee Discovery achieving significant market share.

I like building relationships with my clients and find it important to create financial solutions based on current needs and wants, considering the current market space. attooh! Group of Companies enables me to provide the best service to my clients. Out of all premiums paid to Discovery by clients, 20% comes from attooh! giving them a highly favoured priority. This instils a high level of confidence in my work, knowing my clients are well looked after.

I understand the economic environment and I know it is important to stay focused, knowledgeable, and goal-orientated within every aspect of one's financial portfolio. My objective is to guide my clients to financial security, by protecting them, their dependents, businesses and employees from unexpected life events, adding value to their journey to financial freedom. This is a key value which drives me in the industry.

I continuously strive to improve my skills and knowledge in all aspects relating to the services and products that I advise, ensuring that I offer the very best financial solutions that are seamless and deliver on their promises. Through Continuous Development Courses (CPD) I am always up to date on current matters pertaining to the current economic environment, Discovery and Financial Service Provider (SFP) legislation. This allows me to ensure that my clients continually receive personalised solutions, and reap the rewards of being a Discovery client benefiting from Discovery's dynamic product range and innovative reward structure.



## CONTACT

### Website

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## QUALIFICATIONS

Hilton College | 2012

Stellenbosch University (BSc) | 2016

University of Cape Town (PGEM) |  
2017



## BUSINESS EXPERIENCE

Financial Advisor | *Discovery*, 2018

Independent Financial Planner | *Re  
ined Wealth* 2019

Financial Advisor | *attooh! Financial  
Wellness*, 2019 - 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".