

SHAUN OTTO

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.

I obtained my HOD qualification in 1991 at the then Potchefstroom Onderwyskollege and joined the financial services industry in 1994. Since then I have held various roles at some of the most prominent Insurance Companies in South Africa, like Liberty Life, Old Mutual and Momentum. In that time, I passed my RFP1,2,3 and RFP 5 exams and attend Continuous Professional Development courses (CPD) whenever one becomes available. 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 strive to continuously improve my skills and knowledge in all aspects relating to the services and products that I advise on, ensuring that I offer the very best financial solutions to my clients.

In 2001 I joined Nedbank as a Financial Planner. In my first year I won the best new advisor award at Nedbank for the 2001/2002 season. I resigned from Nedbank and joined attooh! in 2016 as a Financial Advisor. My affiliation with the Discovery Group allows my clients to continually receive the personalised solutions they need, as well as to reap the rewards of being a Discovery client, benefitting from Discovery's dynamic product range and innovative rewards structure.

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 by protecting you and your family, your business and employees, from expected and unexpected life events. I strive to add value, not only to your financial portfolio, but in every aspect of your journey towards financial freedom.

Along with attooh!, I believe that success is based on the fundamental principal 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



Financial advisor



CONTACT

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DOES YOUR MONEY NEED A "PROFESSIONAL TRAINER"?

Imagine a world where finance is associated with **LIFE, TIME** and **GROWTH** rather than **ANXIETY** and **STRESS**? At attooh! We believe that your financial journey should and could be a journey of enjoyment, fulfilment and escalating success.

It really is time to put **YOU** first. Take control of your finances and allow me, as your Financial Coach to guide you along the way.

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 insurance



FIDUCIARY

- Wills and Estate
- Trust and Tax solutions



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".