

RIAAN STEVEN-JENNINGS

Financial Advisor

Riaan is a Financial advisor, affiliated with the attooh! Group of Companies, and 36 years experience in the industry. Previous experience includes Broker Consultant at Old Mutual and Sanlam, Regional Business Development Manager at Discovery Health, Franchise Director with Efficient Group, Sandton Broker branch. Riaan was part of the marketing and sales team during the very exciting time of the launch of the new generation Discovery Health product, since 1997. Achieving top accolades during her career.

Discovery further developed Vitality, Life ,Invest, Insure, GAP cover and Discovery Bank, creating a suite of products to market, offering a client insight to the structuring of a comprehensive financial portfolio. Fully qualified and registered as a Financial Advisor since 2012. Being passionate about people and their wellbeing makes it so much easier for her to reach her objectives. Guiding clients to financial success by protecting the client, their beneficiaries, business partners and employees, from unexpected life events. Helping clients, adding value to their journey to financial freedom.

Encompassing Personal risk (Life, Income Protection, Disability, Severe Illness), Investments, Pre and Post Retirement planning, Short term Insurance, Group Life, Medical Aid, Vitality and GAP cover products. Wills and Trusts. Her awareness of the volatile economic environment, ever changing technology, focus and knowledge, enables her to enrich the quality of people's lives by providing professional sound advice, holistic solutions, and sustainable financial products with reliable outcome.

Long term relationships that she has with her clients, being goal-orientated, passionate about Health and Fitness, and her proficient team at attooh! Group of Companies, enables her to provide surety and peace of mind to her client, through customised comprehensive financial planning being in place, at all time. "Making people healthier, enhancing and protecting their lives".

Riaan Steven-Jennings

Financial Advisor



CONTACT

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QUALIFICATIONS

"Certified National Certificate in Wealth Management, Mini MBA".



BUSINESS EXPERIENCE

Discovery Holdings | *Business Development Manager, 1997 -2013*

1618 Financial Services | *Financial Advisor, 2013 - 2018*

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Efficient Group Ltd | *Business Development Executive, 2018 -2019*

E Mondaine Group | *Executive Business Manager, 2019 - 2021*

attooh! Group | *Financial Advisor current*



Discovery



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".