

LUCIA KALAPE

Financial Advisor

I am a Financial Advisor and proud member of the attooh! Group of Companies, an award winning Financial Advisor Group with a national footprint.

At attooh! we specialise in a full spectrum of corporate and individual financial services. We are passionate about providing clients with tailor-made financial plans, personalised financial education packages, as well as forming lifelong bonds.

I relate to the company icon, the butterfly, as I believe in a metamorphosis of dynamic change and improvement. I believe in helping my clients achieve this transition. This goes hand-in-hand with our company motto: "We make ordinary people Millionaires and make Millionaires Financially Independent".

With my qualifications, experience and an incredible Support Staff, I am confident that I can guide my clients to becoming financially independent "Millionaires" by implementing holistic, personalised plans to achieve their financial goals and freedom.

With a passion for guiding individuals on their financial journeys. I believe that everyone deserves the tools and knowledge to achieve their financial goals, whether it's saving for a dream home, planning for retirement, or managing debt. By fostering strong relationships and providing personalized advice, I empower clients to make informed decisions that lead to lasting financial stability. Committed to continuous learning, I stay updated on industry trends to offer the best strategies for success.

It is important to me that I add consistent value to my clients and their businesses by staying up to date on current Legislation, Taxation, Products, Practices and industry news. My association with the Discovery Group means that I am able to offer my clients the best financial solutions from a dynamic product range, as well as the benefits of the innovative Discovery rewards programme. These tailor-made packages, as well as my personalised service, help my clients to make their financial dreams a reality. I strive to add value to both their experience and their lives, as we move through the evolution of their financial status.

In this uncertain economic climate, it is important for me to maintain a hands-on approach, to ensure that I protect my clients and their businesses from the expected and unexpected.

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CONTACT

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QUALIFICATIONS

Financial Planner and Advisor, RE5
Qualified



BUSINESS EXPERIENCE

Phekon Financial Solutions | *Financial
Advisor, 2017 -2024*

attooh! Financial 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".