

MARISA ERASMUS

Financial Advisor

My name is Marisa Erasmus and I am a Financial Advisor privileged to be affiliated with the award-winning attooh! Group of Companies. As a member of this esteemed Financial Advisor group, I specialise in a comprehensive range of corporate and individual financial services.

Growing up in a family of farmers on the Highveld of Mpumalanga, I learned from a young age that understanding financial planning is crucial for individuals, families and organisations. Getting to know the concepts of life insurance, estate planning, investments and the importance of a will all formed part of the school of life. On top of gaining insight into the financial industry, the importance of networking and relationships was realised. At the end of the day, people matter most.

My degree in Business Communication (TUT, 2007) enabled me to work at a few public relations agencies in Johannesburg, whereafter I worked as an internal communications officer for a large mining company. However, family proved more important as I resigned in 2008 in order to raise our first-born son. A few years after the birth of our second child, I decided to literally go back to school with our children. This led me to obtaining a postgraduate degree in education in 2016 (UNISA). Forming part of the education sector for almost 12 years equipped me with a wealth of knowledge on people and what motivates behaviour. It is here I learned that peoples' emotions, especially fear, drive their everyday behaviour. I realised that I have a desire to empower people with knowledge and insights in many walks of life, especially concerning their finances.

"If you don't know where you are going, any road will get you there." – Lewis Carroll

Being able to decipher the intricacies of financial instruments forms part of my purpose. I strive to empower my clients by providing insights into their financial situation, the opportunities and the potential pitfalls. I guide them to determine what their financial goals are and to set the correct financial instruments in place to attain these goals. My genuine concern for the well-being of my clients and their families ultimately drives my purpose and my passion.

"At any moment we have two options: to step forward into growth or step back into safety." – Abraham Maslow

I look forward to partnering with like-minded growth-mindset individuals who envision financial wellness.


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CONTACT

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QUALIFICATIONS

B. Tech Business Communication
(2007)

Post Graduate Certificate in
Education (2016)



BUSINESS EXPERIENCE

Anglo American Goedehoop Colliery
| Internal Communications Officer,
2006 -2008

Laerskool H.M. Swart | Teacher, 2013
-2019

Jim van Tonder School | Teacher, 2020
-2022

Laerskool Kruinpark | Teacher, 2023-
2024

attooh! Finanail 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".