

JESSICA DU PLESSIS

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.

I offer comprehensive, bespoke financial and wealth planning with a primary goal of optimizing my clients portfolio, customized and personalized to their lifestyle and businesses' needs.

I have been in the financial services industry since 2020 and in this time I have held various roles at some of the most prominent Insurance Companies in South Africa, like Perlov and Associates . 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.

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.

These tailor-made packages with Discovery, 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 expected and unexpected changes.

Our company motto is "We make ordinary people Millionaires and make Millionaires Financially Independent" and this is what I want to do for you. I believe that with my experience, knowledge and my incredible support staff, we can make this a reality. I will work with you to create a holistic, personalised plan to achieve your financial goals and freedom.



Financial Advisor



CONTACT

Website

www.jessicaduplessis.co.za

Email Address

jessica.duplessis@attooh.co.za

Mobile Number

+27(0) 61 518 3424

Physical Address

3F Matrix Building, 1 Bridgeway,
Century City, 8001



QUALIFICATIONS

BBA Milpark business school



BUSINESS EXPERIENCE

Perlov and Associates | *Financial Advisor, 2020 - 2023*

attooh! | *Financial Advisor, current*



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".