

SHAUL RUBIN

Financial Advisor

I am a Financial advisor affiliated with the attooh! I work with business professionals, business owners, individual clients as well as young professionals, offering expert advice in:

- Investment Planning – short, medium and long term
- Retirement Planning
- Life Assurance, Risk Assurance and Disability Assurance
- Medical Aids & Gap Cover
- Pension and Provident Funds
- Partnership Agreements and Key-man Assurance
- Business Assurance
- Short Term Insurance – Home / Cars / Content
- I will also assist in looking at maximizing your current tax structure to optimize benefit to your financial portfolio.

With personal family background, experience and qualifications it enables me to provide you with expert financial advice. My objective is to guide you through your financial journey and to add considerable value to you, your family and your company's financial wellness. With the assistance of my professional team of support staff, I am able to assist you in implementing a holistic, personalised plan to achieve your financial goal(s).

I have been in the financial services industry for thirteen (13) years and in this I have held various roles at some of the most prominent Insurance Companies in South Africa the likes of Liberty and Discovery. 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.

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 to financial freedom to become a reality.

I understand that we find ourselves in a volatile economic environment, it's 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.

"Price is what you pay. Value is what you get." - Warren Buffett



CONTACT

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Discovery



DOES YOUR MONEY NEED A “PROFESSIONAL TRAINER”?

Financial planning is more than just numbers on a piece of paper. It's about your life – and what you want out of it. Do you understand where you are? Do you know what your financial goal is? How about the security of your family's future? Financial planning connects life with finance and evaluates the assets needed to help make a dream come true. We use financial tools to help us learn about your goals to offer guidance for every step of your journey in this unpredictable life.

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 lines



FIDUCIARY

- Wills and Estate
- Trusts



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".