Connie Jordaan

Financial Advisor

ABOUT **ME**

Your Guide to Financial Success
I am proud to be associated with the attooh! Group of Companies and supported by my proficient team. I look forward to creating a professional partnership with you, through which I can offer you my expert Financial Advice and Intermediary Service. My objective is to guide you through your financial journey and to add considerable value to you and your company's financial wellness. "You have to learn the rules of the game. And then you have to play better than anyone else." – Albert Einstein. In this ever changing market, you constantly need to keep ahead of the pack, as it's imperative to set the bar higher than your competition. It has always been my belief that knowledge is power and that only by selecting the correct guide can you achieve your true financial potential.

My core foundation and purpose is
Creating lifelong relationships based on mutual trust and best advice. My objective is to guide you 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.

My journey towards Business Excellence
I joined the financial services industry in 1983 as an agent for Prudential and moved with them to Liberty Life. In over 20 years of service as a Liberty Life agent, 19 of which I was consecutively in the Top 50 consultants out of a national 6 500 members, also achieving Top 25 status. For 10 years during this period I served as a Manager, I also achieved my ILPA qualification. Identifying a need to provide my clients with a choice of services, I became a broker and achieved Platinum Broker status with Discovery Life for 5 years and ultimately achieving Discovery's highest award as a Discovery Premier Platinum Broker.

My continuous journey of Self Development
I obtained my ILPA in 1999. This qualification, the Institute of Life and Pension Advisers qualifying examination, is now referred to as a CFP. 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, so that I can provide the best personalised financial solutions and advice to my clients.

DEVELOPMENT PROGRAMME

- Peter Sage – Millionaire Business School
- Andy Harrington – University of Public Speaking
- Gerry Roberts – Millionaire Mindset
- S.O.A.R – FLAME (Flow, Leadership and Learning, Awareness, Mastery, Evolution)
- DR Demartini - The Breakthrough Experience
- Privileged Leadership and Lifestyle Program
- Secrets to Financial Success

DOWNLOAD FREE EBOOK

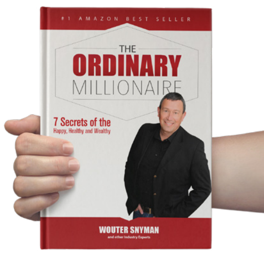
Are you a millionaire or on your way to Financial Independence?

A team of Financial Advisors wrote the #1 Amazon Best seller, "The Ordinary Millionaire" containing the 7 secrets of the Happy, Healthy and Wealthy. This book will teach and equip you to move from where you are to where you want to be.

The Ordinary Millionaire will guide you through 100 year old principles and take you on a personalised journey to make the content your own and to ensure your Financial Independence.

The aim is to help you get to that "Ordinary Millionaire" status and more importantly, to enjoy life as one of the few who cracked the secret to Financial Independence and the state "Happy, Healthy and Wealthy."

Please visit my website and download this book for FREE!



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ABOUT ATTOOH!

As a Boutique firm we specialise in value-added solutions that incorporates the financial advisory process with a focus on dedicated and tailor-made client education packages. We cover the full spectrum of financial services products and each client's ability to interact with us from cradle to grave.

Corporate dinosaurs boast about the number of years they have been around and the number of clients that they have on their books.

What matters most is an intimate entrepreneurial approach, in partnership with clients, to provide them with tailor-made service solutions and offerings that they appreciate, understand and value.

At attooh! we have a corporate view with an individual focus. Our Core Purpose is to empower individuals, at all levels of the economic spectrum, with solutions - not just products.

CORE SERVICES

RISK PLANNING

- Life cover.
- Disability Protection.
- Dread Disease cover.
- Physical and Functional impairment.
- Income Protection.
- Death / Disability Premium waiver.
- Funeral Cover.

HEALTHCARE PLANNING

- Medical aid cover.
- From hospital plans to comprehensive medical aid.
- Gap cover and Health Plan protector .

INVESTMENT PLANNING

- Flexible investments (no term)
- Unit trusts
- Endowments (5 or 10 year plans)

RETIREMENT PLANNING

- Retirement Annuities.
- Pension / Provident Preservation plans.
- Living annuities, Fixed interest Annuities and Income plans.

ADDITIONAL SERVICES

EDUCATION

- Education Protectors and Savings plans.
- "The Ordinary Millionaire" is a set of financial literacy training programs that focus on providing education, guidance and coaching that empowers individuals to take control of their financial situation.

EMPLOYEE BENEFITS

- Group Risk Benefits.
- Pension and Provident fund Consulting.
- Specialist representatives Nationwide
- A dedicated Fund Consultant and administrative person will be allocated to your company.

BUSINESS PLANNING

- Buy & Sell arrangements.
- Key person cover.
- Contingent liability.
- Loan account, overdraft, surety insurance and business overheads protector.

SHORT-TERM INSURANCE

- **Personal lines:**
  Home owners.
  House hold and vehicle insurance.
- **Commercial:**
  Cover for businesses.

ESTATE PLANNING

- Wills.
- Trusts.
- Executor services for winding up deceased estates.
- Protection Plans to protect your Estate against Excecutor, Conveyance and Trustee fees.

ASSET CONSULTING

- Assist retirement fund members to achieve better outcomes at retirement.
- Retirement fund investment strategy development, adoption and implementation.
- Board and member investment education and communication.