

KGOMOTSO LAVISA

Financial Advisor

"My why: I'm a middle child of three sons, East Rand born, a loving mother who's still a nurse and a retired father who used to be a teacher. Born in a Christian home. I'm also recently married to an amazing woman, since 2015 and it's just getting better and better. She's an amazing person, despite always asking me when are we getting children. This is my why, the reason I work, the individual I am. Purpose includes who you are meant to impact and should always go beyond our closest associations, and so my phrase "People Matter". The focus would always be to improve the lives of clients and ensure they reach their financial goals.

Luke 2:49 "...I'm all about my Fathers business"

We all need to partakers in the economy, having our share and influence. Being well educated in our finances, betters us and even the well-fare of the country, expanding to the rest of the world, so being financially stable and having all our needs met sets the standard for who we are and where we are.

Satisfaction and results are everything. I enjoy the teaching process and arriving at the destination where the client knows the value of their wealth, and the great lengths it can achieve. In all respect, we'll be remembered for two things; the problems we caused and the problems we solved.

My strength is found in my belief system, I never cease to believe in the circumstances of the client, but view the problem as an opportunity. I'm a sold out Christian, adding my beliefs into the workplace such as integrity. People are everything, the world needs people for it to function, and I believe in solving great needs.



CONTACT

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QUALIFICATIONS

University of the Free State | *B.Com Investment Management and Banking, 2014*

University of the Free State | *B.Com Honors Investment Management and Financial Banking , 2015*

Postgraduate Higher Diploma | Financial Planning, 2017



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".