

ERIC SWANEPOEL

Financial Advisor

I am a seasoned and dedicated Financial Advisor with a passion for empowering individuals, families, and businesses to reach their full financial potential. Since I joined the Financial Industry, I became obsessed with the experience in wealth management, investment strategies, and retirement planning, and I built a reputation for delivering customized financial solutions that go beyond just numbers, I want to build lifelong partnerships based on trust, care, and a deep understanding of my clients' unique goals.

Unfortunately, my dad passed when I was 20 years old, and since then, I realised the importance of financial security in every family. My dad was the breadwinner, and I believe in such a life-changing event, a family should be focused on recalibrating themselves and focus on their future, without the stress of financial security. I promised myself that I will not allow that situation to happen to any other family, and what better way to pursue that dream than to be a Financial Advisor.

From an early age, I recognized the transformative power of smart financial planning. My journey has been defined by an unwavering commitment to staying ahead of market trends, mastering innovative investment strategies, and ensuring that my clients are always well-positioned for success.

What sets me apart is my client-first approach. I understand that financial planning is more than just growing wealth; it's about creating peace of mind, securing legacies, and achieving life aspirations. Whether I am helping a young professional build a strong financial foundation, guiding a family toward homeownership, or crafting a strategic retirement plan for a seasoned entrepreneur, I always take the time to truly listen and tailor my advice to align with each client's vision.

I believe in educating my clients, empowering them with the knowledge they need to make confident financial decisions. My hands-on approach ensures that my clients are not just following a plan but actively understanding and participating in the journey toward financial success.

With a relentless drive for excellence and a genuine passion for making a difference, I am more than just a Financial Advisor—I am a trusted guide, a strategic partner, and a steadfast advocate for my clients' financial well-being. Whether navigating market shifts or celebrating financial milestones, I remain committed to helping my clients strive beyond their financial potential and create the future they deserve.



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CONTACT

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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



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

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".