

GRAEME SHEPHERD

Financial Advisor

I am a Financial Planner affiliated with the attooh! Group, a leading financial advisory network with a national footprint. At attooh! we specialise in delivering comprehensive financial solutions across personal financial planning, business assurance, corporate benefits, investment planning, estate planning, retirement planning and healthcare.

My career began in financial services within the banking sector, where I spent 15 years specialising in property finance and credit risk. This foundation provided me with a strong understanding of financial structures, risk assessment and disciplined decision-making. I later transitioned into client and project management, developing a focus on relationship building, strategic delivery and managing complex portfolios.

This diverse experience enables me to bring a well-rounded, people-centric and strategic approach to financial planning.

I believe financial planning is the cornerstone of financial independence—aligning your current financial position with your long-term goals and aspirations.

My role is to assess your financial provisions, identify gaps or risks, and implement tailored solutions to:

- Protect your wealth
- Create and grow your wealth

I take a holistic approach, ensuring every aspect of your financial life is aligned and working together effectively.

A key part of my philosophy is addressing the “5 Problems in Life”—events that can significantly impact financial security if not planned for:

- Living too long – outliving your financial resources
- Dying too soon – leaving dependants financially vulnerable
- Disability or dread disease – the impact of serious illness or disability
- Medical expenses – insufficient provision for healthcare needs
- Taxation and inflation – the erosion of wealth over time

Planning for these risks helps ensure long-term financial security for you and your family.

Every client’s situation is unique and requires a personalised solution. I focus on building long-term, trusted relationships where your needs and goals come first. Through ongoing engagement, education and tailored advice, I aim to provide clarity, confidence and peace of mind on your journey to financial independence.

With experience across banking, risk and client management, I offer both technical expertise and a strong understanding of financial behaviour. Supported by the attooh! network, I provide:

- Holistic financial planning solutions
- Personalised strategies aligned to your goals
- Ongoing support and guidance
- Access to leading financial products and structures

I welcome the opportunity to review your financial portfolio and help you build a secure, sustainable plan for the future. Please feel free to get in touch via email or phone.



Financial Advisor



CONTACT

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Graeme Shepherd



QUALIFICATIONS

Bachelor of Commerce (BCom)



Discovery



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



PERSONAL BANKING



WILLS & ESTATES



HEALTH

- Medical aid
- Gap cover



INVESTMENTS

- Local, guaranteed and offshore
- Retirement investments



SHORT TERM INSURANCE

- Personal lines
- Commercial insurance



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".