

SANJEEV JADOONANDAN

Financial Advisor

When you are making important financial decisions, you want guidance from someone who takes the time to understand your goals, your family, and the future you are working hard to build. That is exactly the experience clients can expect when working with Sanjeev Jadoonandan, a Financial Advisor at Attooh. With more than 30 years of experience in the financial services industry, Sanjeev focuses on helping professionals, pre-retirees, business owners, and families build structured, long-term financial plans that protect and grow their wealth.

Sanjeev believes that good financial advice should follow a clear order: structure first, then strategy, and only then product implementation. Too often, people end up with a collection of separate financial products that do not work together. Sanjeev has made it his mission to change that, helping clients move from fragmented solutions to a coordinated plan where their protection, investments, and long-term goals are all aligned.

His approach is centred on building long-term relationships with clients. Using the globally recognised six-step financial planning process, Sanjeev works alongside individuals and families through different stages of life, making sure their plans are reviewed and adjusted as their circumstances change. Every recommendation he makes is needs-based, compliant with FAIS and the applicable tax laws, and tied to clear, measurable objectives, so clients understand not only what decisions to make, but also why those decisions matter.

Sanjeev specialises in several key areas of financial planning, including retirement planning, risk and insurance planning, investment planning, and estate planning. He helps clients structure tax-efficient retirement annuities, preserve and optimise their pension and provident benefits, and plan structured drawdown strategies for retirement. He also puts in place appropriate life, disability, severe illness, and income protection cover, and supports business owners with business assurance, key-person cover, and succession planning. Whether a client is building long-term capital, preparing for retirement, or planning to pass wealth on to the next generation, Sanjeev focuses on strategies that are practical, tax-efficient, and aligned with each client's goals.

Sanjeev also understands that financial wellbeing extends beyond investments and insurance. Clients often seek guidance on broader financial topics such as life insurance, medical aid, car insurance, wills and trusts, and everyday banking. By helping clients navigate these considerations as part of one integrated plan, Sanjeev ensures they have a clear and structured approach to managing both their protection and their wealth.

For Sanjeev, financial advice is not just about numbers; it is about helping people create the future they envision. By combining structured planning, tax-efficient strategies, and long-term relationships, he is committed to helping clients protect what matters most and build lasting, intergenerational wealth.



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CONTACT

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QUALIFICATIONS

NQF 6 in Financial Markets and
Instruments



BUSINESS EXPERIENCE

Discovery | Financial advisor | 2019
- 2025

Genesis Advisory Services | Financial
advisor | 2019 - 2019

Momentum | Employee benefits
specialist | 2009 - 2012



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".