

COMPREHENSIVE FINANCIAL ADVISORY SERVICES

Take control of your financial life with a Financial Wellness Assessment.



Le Roux International understands that the journey to financial wellness is not a one-size-fits-all approach. No one's financial history or aspirations are the same. We examine every touchpoint of your financial ecosystem to determine the best course of action for long-term success.

Corporate Financial Wellness

Research shows that employee financial stress is detrimental to both productivity and profitability - let us help you nurture a healthy workforce with financial benefits that matter. Comprehensive and tailored financial wellness results in healthier and more focused employees, increased creativity and innovation and stronger employee loyalty.

We meet personally with employees to:

1. We create a visual representation of your financial life from information provided or collected from the insurance systems with your consent.
2. We meet and complete the Financial Wellness Assessment to understand your financial life, expectations for retirement and your unique goals. You earn a score out of 10 with bonus points available for good habits.



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3. Provide them with the tools and strategies needed to achieve their financial ambitions. This encompasses a 30-minute consulting session where financial goals and touchpoints are discussed, and an appropriate action plan is presented.

Reach out on 071 578 0623 (Frants Preis)

or frants@preisinvest.com



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