



Get the financial advice you need

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Financial Planning

| Investments

| Insurance

| Retirement

| Wealth

Get the financial advice you need with **Bartlou BlueStar**

We're committed to helping you reach your financial goals – whether you're planning for retirement, saving for a holiday, securing your child's future, or building your business.

Consulting an accredited financial adviser is essential to help you with some of the most important financial

decisions of your life – and at Bartlou BlueStar, we offer you holistic advice to help you reach your financial goals, achieve sustainable wealth and gain peace of mind.

But what is it that sets a BlueStar business like ours apart?



A range of **financial expertise** under one roof

At Bartlou BlueStar, you'll draw on the expertise of a team of financial specialists who can offer you personalised advice and a wide range of financial solutions – from financial planning and insurance to investment advice and retirement planning. We also offer short-term insurance with our partners MiWay and Santam. And if any of your financial needs can't be addressed by one of our advisers, we'll source an expert for you.

Continuity and **peace of mind**

As a Bartlou BlueStar client, you'll be building a relationship with our team of financial advisers, rather than with a single adviser. And this means that you'll always deal with someone who understands your financial situation and goals and knows your long-term financial plan. This continuity, along with the knowledge that the financial advice we provide is backed by Sanlam, means you can rest assured that your finances are always in good hands.

Our **commitment to you**

With more than 20 years of combined knowledge and experience, Bartlou BlueStar renders financial advice with honesty and integrity to give you total peace of mind, and heart. We have friendly staff that will always show you the respect you deserve and treat your information with confidentiality.

We are based in Witbank, Mpumalanga, and our connection with Sanlam and Santam ensures that we comply with all the legal requirements of the industry as recommended by the Financial Services Board. This ensures that you can always enjoy financial protection and peace of mind.

We cater for your unique needs and circumstances to ensure that you reach your financial goals while building long-term, sustainable wealth.





Products and Services:

We offer a comprehensive range of products and services to help you achieve your financial goals through each stage of your journey covering all your needs from personal income protection, short- and medium-term savings goals, retirement planning and the commercial needs of your business.



Insurance

Personal:

- Life Cover
- Disability Cover
- Severe Illness Cover
- Impairment Cover
- Accident Cover
- Income Protection
- Sickness Benefit
- Funeral Cover
- Business:**
- Key Person
- Buy and Sell
- Contingent liability

Short-term Insurance

- Property
 - Personal
 - Commercial / Business
- Engineering
- Vehicle
- Liability
- Accident
- Aviation
- Marine
- Household
- Agriculture
- Director's Liability

Retirement

- Retirement Annuities
- Pension Funds
- Provident Funds
- Preservation Funds
- Living Annuities

Investments

- Tax-free investments
- Unit Trusts
- ILLAs / ILLIs
- Endowments
- Preservation funds
- International / Offshore options
- Life Annuities
- Term Annuities
- Short/Long term Investments
- Diversified investments – Glacier by Sanlam
- Collective Investments
- Shares



Medical insurance

- Gap Cover
- Medical Aid (Bonitas / Fedhealth)

Employee Benefits

- Retirement funding

Estate Planning

- Wills
- Beneficiary Fund
- Estate Administration

Loyalty Program

- Reality



Meet the team



Jaco le Grange
Principal | Senior Financial Advisor
National Certificate: Wealth
Management NQF5



Judith Mocke
Personal Assistant



Liesl Meyer
STi | Tax Practitioner
FETC: Short Term
Insurance NQF 4
National Certificate:
Course in Taxation



Johan Kriel
Advisor in Training
Matric (Grade 12)
Certificate in Financial
Planning
1st Level
Regulatory Exam for
Representatives (RE5)



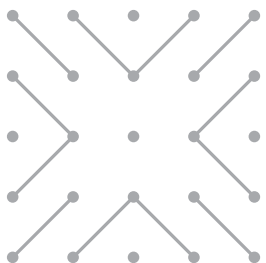
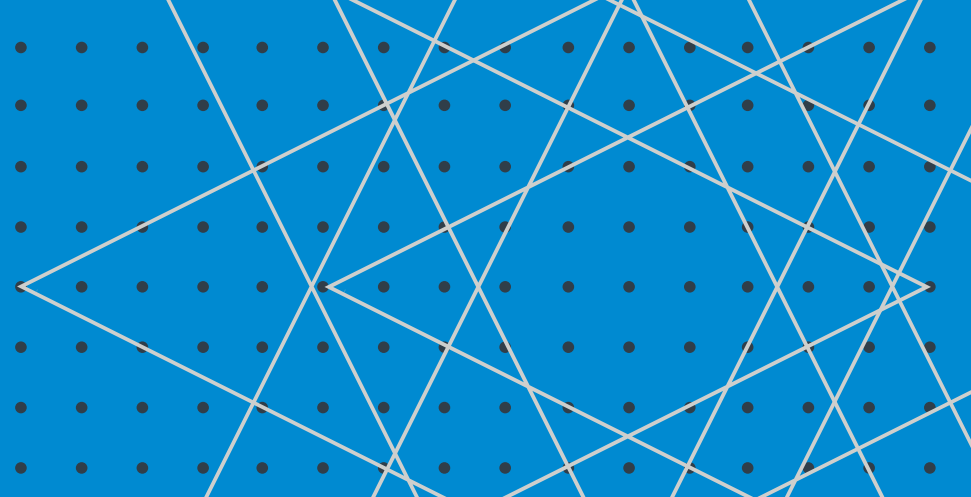
Francois Viljoen
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