



Get the financial advice you need

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Financial Planning

| Investments

| Insurance

| Health

| Retirement

| Wealth

# Get the financial advice you need with **Socrates 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 Socrates 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 Socrates 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 Socrates 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**

We provide sustainable, holistic financial advisory services to individuals and groups who are serious about their circumstances and dreams.

By taking your personal financial needs and goals into account, we will present you with a plan that suits your unique needs.

We are committed to building and maintaining long-term client relationships. Our aim is to ensure our clients' financial well-being and peace of mind, and we follow a strict and transparent process that fully addresses our clients' needs and promote their interests.

We are a professional and dedicated team with combined experience of 25 years in financial services. We have the necessary qualifications, regulatory requirements in terms of legislation, and the understanding to take care of all your financial needs and to offer sustainable solutions adapted to your personal needs. With us you do business with a TEAM and not an individual, and you can rest assured that we will always look after your affairs.





## 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

# Retirement

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

# Investments

- Tax-free investments
- Unit Trusts
- Various options on LISP (Linked Investments)
- ILLAs / ILLIs
- Endowments
- Preservation funds
- International / Offshore options
- Life Annuities
- Term Annuities
- Saving plans
- Short/Long term Investments
- Diversified investments – Glacier by Sanlam
- Collective Investments
- Shares



## Employee Benefits

- Retirement funding

## Estate Planning

- Wills
- Trusts
- Beneficiary Fund
- Estate Administration
- Business Trusts

## Loyalty Program

- Reality

## In association with our partners we can offer:

- Accounting and Tax Services
- Legal Advice



# Meet the team



Martin Ferreira  
Senior Adviser  
CFP / LLM (Corporate) / LLM (Tax)  
Admitted Attorney and Conveyancer  
Advanced Diploma in Trust Law  
Investment Specialist Adviser



Albert Fritz  
Adviser  
CFP / MBA



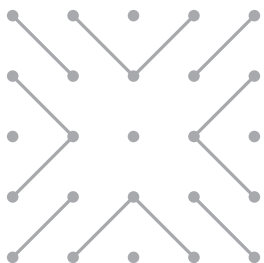
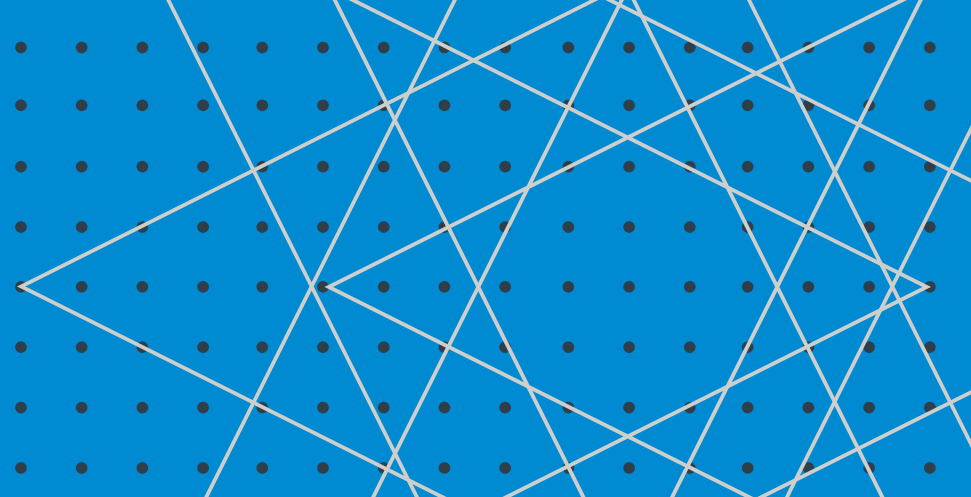
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# Contact us



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