

Duxfin
BlueStar

authorised by  **Sanlam**

Get the financial advice you need

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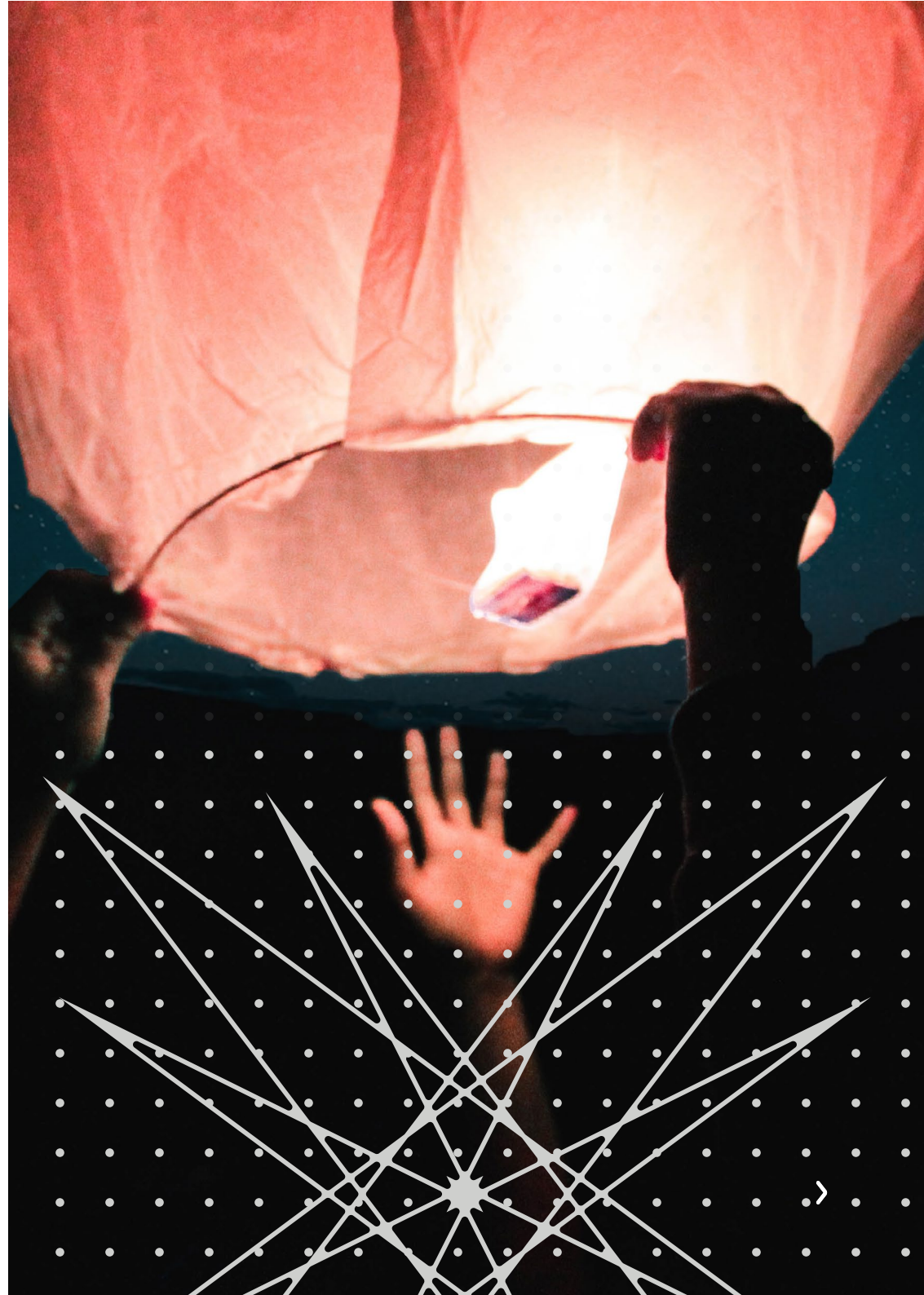
Get the financial advice you need with **Duxfin BlueStar**

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 Duxfin 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 Duxfin 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 Duxfin BlueStar client, you'll be building a relationship with our team of financial advisers, rather than with a single adviser. 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**

At Duxfin we strive to be stewards of our clients' finances and wealth, through holistic, bespoke solutions, protecting their interests and providing them with unparalleled peace of mind.

Core values

- Professionalism
- Integrity
- Balance





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
- Vehicle
- Liability
- Accident
- Agriculture
- Household
- Director's Liability
- Travel Insurance

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
- Various options on LISP (Linked Investments)
- Life Annuities
- Term Annuities
- Short/Long term Investments
- Diversified investments – Glacier by Sanlam
- Collective Investments (Unit Trusts)
- Saving plans
- Share Portfolios



Medical insurance

- Gap Cover
- Medical Aid (Bonitas / Fedhealth)

Employee Benefits

- Retirement funding

Estate Planning

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

Loyalty Program

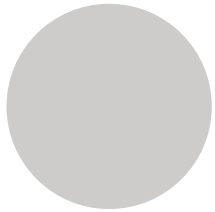
- Reality

Other services offered in co-operation with our partners

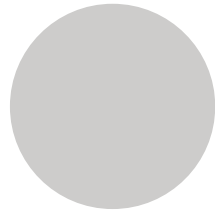
- Legal Advice
- Fiduciary Services



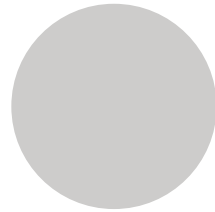
Meet the team



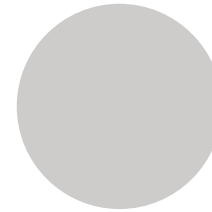
Adv Corneel Pelser CFP®
BComm LLB LLM
(Post Graduate Diploma
in Financial Planning)



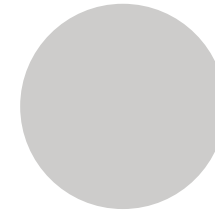
Jean le Roux CFP®
(Post Graduate Diploma
in Financial Planning)
Post Graduate Diploma
Investment Planning



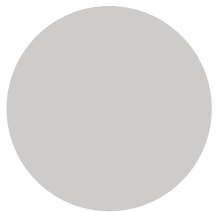
Marnus Janse van Rensburg CFP®
BComm
(Post Graduate Diploma
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Post Graduate Diploma
Investment Planning



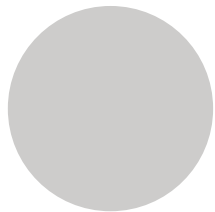
Zito de Gois CFP®
(Post Graduate Diploma in
Financial Planning)



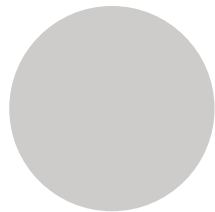
Marené Burger CFP®
(Post Graduate Diploma in
Financial Planning)



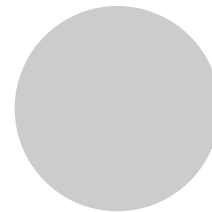
Chris van Zyl
BComm (Law)



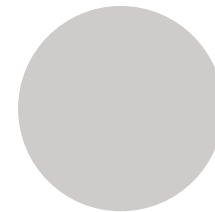
Jonan Lange
BComm (Business Management)



Liezel Dreyer
BCompt (Accounting Science)



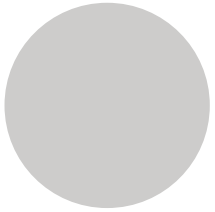
Chantelle van Loggerenberg
Diploma in Wealth Management



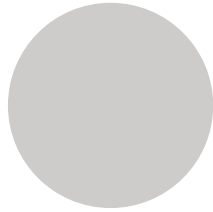
Mariaan Booysens
Diploma in Wealth Management



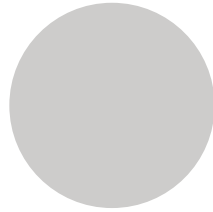
Meet the team



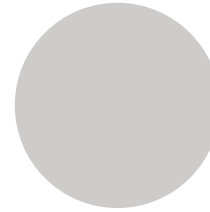
Bertha Stevens
Diploma in Wealth Management



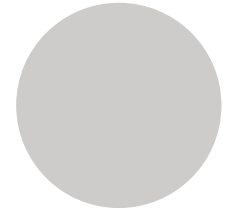
Jana Venter
Diploma in Wealth Management



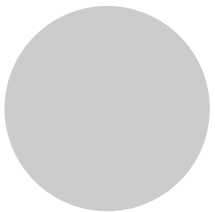
Jan van Deventer
Diploma in Wealth Management



Francois Ludick



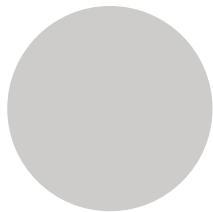
Jacques van Loggerenberg



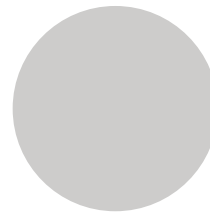
Carika van Loggerenberg



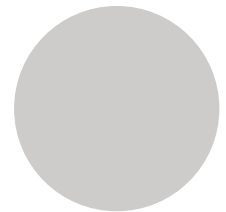
Sonja Delport



Marli Marais



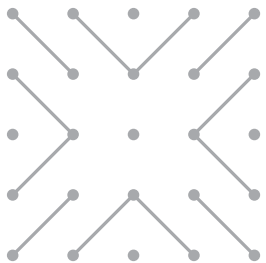
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