



Get the financial advice you need

[Read more >](#)

Financial Planning

| Investments

| Insurance

| Retirement

| Wealth

Get the financial advice you need with **Epivest 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 Epivest 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 Epivest 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 an Epivest 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**

Epivest BlueStar is a team of professionals with specialised knowledge and skills in the financial services industry. As our client, you can always rely on service that is:

- Researched
- Transparent
- Confidential
- Specialised





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

Short-term Insurance

- Property
 - Personal
 - Commercial / Business
- Vehicle
- Liability
- Accident
- Agriculture
- Household
- 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
- Various options on LISP (Linked Investments)
- Life Annuities
- Term Annuities
- Short/Long term Investments
- Diversified investments – Glacier by Sanlam
- Collective Investments
- Saving plans



Medical insurance

- Gap Cover
- Medical Aid (Bonitas / Fedhealth)

Employee Benefits

- Retirement funding

Estate Planning

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

Loyalty Program

- Reality

In association with our partners we can offer:

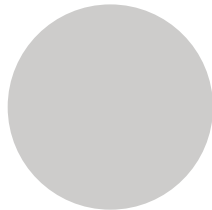
- Accounting and Tax Services
- Legal Advice



Meet the team



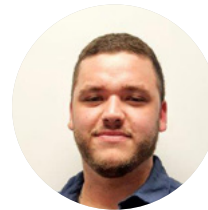
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Financial Planner: Wealth
Management



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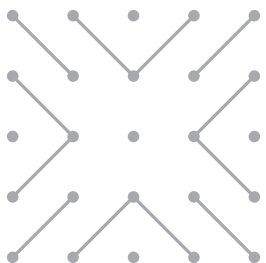
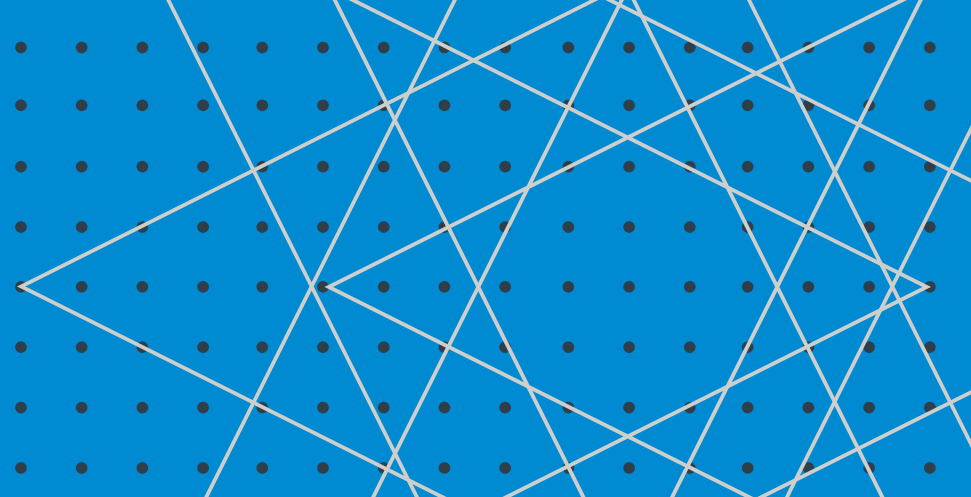
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