



A well plotted flight path
ensures you soar to great
financial heights!

Soar!

*Eagles don't flap their
wings to gain altitude. They
rely on rising air currents
and soar.*

Firebird **BlueStar**

Financial Advisory Services

authorised by  **Sanlam**

ADVISORY | TAX | LEGAL

We are all about **understanding your unique needs**

As an individual, business owner, family head, or trustee your needs will be unique and specific. We all need to be heard to be understood and it is through intently listening that we transform your needs into your future flight path.

Expertly, objectively and with all our 'ducks in a row' we advise, strategise and manage your wealth and risk portfolios, trusts, employee requirements, legal advice and more.

In every aspect of life and at every unexpected turn we will be there to guide and support you – always available and always going far above and beyond our mandate as your Financial Advisors.

You are unique

The hummingbird has a unique bill that is long and thin which is specially designed for licking nectar from flowers.



A Comprehensive Wealth Advisory service that makes a difference

For individuals, companies, trusts and deceased estates, we are the differential between the mundane and the exceptional. Offering a comprehensive range of services, our approach is highly personal, purposeful and builds long term relationships based on...



EXPERTISE

All highly qualified, our Financial Advisors achieve impressive results through expert knowledge.



TRUST

We hold ourselves fully accountable to achieving your personal wealth building objectives.



SKILLS INTEGRATION

Tax, legal and financial specialists work as a cohesive unit to ensure the finest financial advisory skills are all at your disposal.

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Fly Smart

Geese have mastered flying smart and conserve energy by rotating the lead and sharing the load of wind resistance.

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Master Builders

Wealth Planning

- Financial planning to guide you and your family to an assured financial future
- Incorporation of financial protection against the unexpected
- Retirement planning, estate planning, wills and trusts

Wealth Management

- Medium to long term solid investment solutions
- Short term cash savings and money market options
- Creative tax optimisation advice and administration
- Excellent foreign investment opportunities for bespoke portfolios

Risk Management

- A wide range of short term insurance options for every type or risk aversion
- Corporate insurance options for commercial businesses and agriculture

A complex nest should be masterfully built

A weaver's nest is truly something to behold. How something so small can so masterfully engineer a home that is both stable and comfortable is truly a wonder of nature.

YOU

Trusts Management

- Governance and administration of all forms of trusts
- Annual financial statements prepared, tax compliance and the submission of returns
- Meetings and resolutions prepared and administered
- Data storage and documentation administration
- Executor representation

Employee benefits for corporate entities

- All forms of benefits undertaken for employees to ensure financial security
- Guidance on group retirement schemes incorporating provident or pension funds
- Medical healthcare options and sourcing the best medical aid schemes
- Group risk benefits to cover disability and life insurance

Legal Advice

- Business partners and shareholders buy and sell agreements drawn up for corporate entities
- All manner of standard legal agreements, wills and trust deeds expertly executed
- Surety and loan agreements drawn up for corporates

Making decisions about what matters most...

We are all about adding value to your life and the things that really matter. There are three essential things in every life journey that most of our clients need to focus and build on. We guide, offer knowledgeable advice and provide valuable solutions for every facet of these life paths – based on tailor made solutions for your unique requirements.



Family Provision

Guiding you to essential provision and protection of you and your family from:

- Marriage guidance and documentation
- Protection and provision for children
- Divorce advice and guidance
- Family protection – disability and dread disease insurance
- Wills and testaments
- Parental or special need dependant's care.



Personal Wealth Planning

Working closely with you and taking cognisance of your unique financial standing, expert, knowledgeable Financial Advisors create a solid wealth portfolio to ensure your future.

- Property investments and resale
- Creative but reliable investment opportunities
- Investment of windfalls and bonuses
- Retirement and pension planning
- Relocation assistance and investment opportunities



Business Building

The flight path of every business is plotted and planned to ensure its protection and profitability.

- Buying and selling
- Partnerships – joining of, or separations
- Employee benefits and wealth planning
- Retiring from, or transferring a business
- Business succession plans

| With passion we plot your perfect flight path

PLANNING

Everything begins with a plan - and with our understanding of your unique situation and aspirations we get you off to the best possible start.



YOUR FLIGHT PATH

Expertly ascertaining all you are likely to encounter along the way and all the opportunities you will have available to you, we launch you on a journey that offers protection and great wealth building potential.



YOUR PERFECT PILOT

Every journey differs, with unexpected twists and turns. We guide and steer you along a path that will ultimately ensure less turbulence, greater safety and ensure you reach your destination.



TRUSTED PARTNERS FOR LIFE

Never leaving your side, as trust builds, we focus on what matters most – your secured future - your safe landing at your place in the sun. We are in this together for the long haul and never leave your side – even through retirement - still seeking better opportunities to live a better life.

Spread your wings

*Imagine if a bird never spread it's wings?
Could that be true for you? Let us help you understand
your flight 'potential' and set out your flight path.*



| Why Us?

Many people go through life believing they can handle their own financial affairs – or at best they may need an accountant or tax consultant to get them through. Astute financial planning encompasses so much more than that.

Your financial life will be one of tax (and many other) compliances, budgeting, assessment of expenditure and purchases, insuring against calamities and hopefully saving and investing in a retirement that will ensure you will live comfortably in your golden years.



The sum of the whole is greater than the sum of its parts.

*You need more than one feather to fly!
It takes a series of diverse and interconnected feathers to make a wing...and then, of course, you need two of them!*

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***A company with* a culture of making a difference**

Imagine a company that takes all of that, and with a genuine passion to make a difference to your life path, creates a holistic plan to envelope all these needs into one ordered, structured perfect plan.

We are exactly such a company. A financial advisory service that lives our philosophy and culture of creating something valuable in every client's life. We treat our people like our customers, understanding each has a unique ability to offer something extraordinary and so every one of them aligns with our ideals and adopts the same approach to our customers.

***Why* Financial Advisors matter**

Firebird BlueStar Financial Advisory Services is renowned for its professionalism and credibility and rates amongst the top companies of its genre in South Africa. Our personalised service is a direct result of maintaining a selective, loyal clientele base who we can always serve without compromise.

We are there for you even when you don't know it - seeking and creating new and better opportunities for each portfolio, never resigning ourselves to the mundane but constantly striving for superior solutions.

We don't sell policies – or simply service clients – we make it a personal objective to ensure that every flight path is planned, protected and ultimately perfected - so every journey we take together has you soaring to new financial heights!

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Every relationship begins with a connection

Contact us to arrange a no
obligation consultation...



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WINNER

of the Sanlam BlueStar
Business Category Award
in 2020

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