

Formentera
BlueStar

authorised by  **Sanlam**

Get the financial advice you need

[Read more](#) 

[Financial Planning](#) | [Retirement](#) | [Insurance](#) | [Health](#) | [Investments](#) | [Wealth](#) | [Credit](#)

Get the financial advice you need with **Formentera 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 Formentera 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 Formentera 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 Formentera 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**

We are an energetic team of professionals with the necessary knowledge and experience to provide financial solutions within a personalised relationship. We are dedicated to understanding your specific needs and circumstances for the purpose of compiling a unique solution for you, in order to achieve financial independence and sustainable wealth. Our core values of integrity, respect and passion steer our focus to add value and ultimately to make our clients exceptionally happy.





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
- Aviation
- Accident
- Agriculture
- Marine
- 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

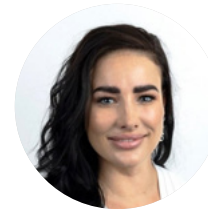
- Reality



Meet the team



Leon Rossouw
Senior Financial Planner



Anniqué van Niekerk
Financial Planner



Nicolette Terblans
Office Manager/Paraplanner



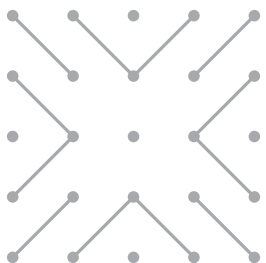
Marianne Meyering
Investment Administrator



Bianca Marais
Pre-Sales Administrator



Contact us



T 021 880 6620

F 086 687 1840

E leon@formentera.co.za

W <https://www.sanlam.co.za/bluestar/Formentera>

