



Goliath
BlueStar

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Get the financial advice you need

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Financial Planning | Retirement | Insurance | Health | Investments | Wealth | Credit



Get the financial advice you need with **Goliath 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. At **Goliath 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 Goliath 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 Goliath 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

Goliath BlueStar's head office is in Rustenburg, North West, with offices in Thabazimbi and Pretoria.

What Goliath BlueStar stands for:

(def) Goliath: Someone of gigantic strength and exceptional achievement

We at Goliath BlueStar strive to be true to the definition of Goliath by helping our clients achieve exceptional performance in their financial portfolio and their life dreams.

We help our valued clients achieve their goals through a deep and careful analysis of their financial needs. With this analysis, we help our clients create and preserve wealth.

Goliath was founded in 2016 by Bernard van der Walt and Pieter Jordaan with one holistic goal, namely to be true to our definition and offer the best professional advice and ongoing professional service to our clients.

Since Goliath BlueStar's inception, we have received numerous awards from Sanlam. We could only have achieved this exceptional achievement by putting together a winning team. We have an excellent back office that can assist our clients with any queries, and advisers who are specialists in every area of financial planning.



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

Short-term Insurance

- Property
 - Personal
 - Commercial / Business
- Engineering
- Vehicle
- Liability
- Accident
- Aviation
- Marine
- Household
- Agriculture
- Director's 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



Medical insurance

- Gap Cover

Employee Benefits

- Retirement funding

Loyalty Program

- Reality

Estate Planning

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



Meet the team



Bernard van der Walt
Financial Adviser
BCom Economics and
Risk Management,
Investment Specialist



Heleen Labuschagne
Financial Adviser



Elsa Dippenaar
Financial Adviser



Ina Olivier
Associate Adviser



Anne-marie van Staden
Associate Adviser



Marelize van Staden
Practice Manager



Emma Du Randt
Personal Assistant





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