



Herbst&Associates BlueStar

authorised by  **Sanlam**

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 **Herbst&Associates 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 [Herbst&Associates 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?



What story do you want to tell?

A range of **financial expertise** under one roof

At Herbst&Associates 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 Herbst&Associates 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.

A decorative horizontal band featuring a repeating geometric pattern of interconnected lines and dots, creating a mesh-like structure in shades of blue and grey.

Our commitment to you

Herbst&Associates is a team of professional financial advisers and staff with expert knowledge and skills in the financial service industry. We provide excellent service to all our clients and we make it possible for clients to secure their families' futures by planning for theirs.



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

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
- Shares (Local and International Direct Share Portfolios)



Employee Benefits

- Retirement funding

Estate Planning

- Wills
- Trusts
- Estate Administration

Loyalty Program

- Reality



Meet the team



Martin Herbst
Senior Financial Adviser
CEO



Renée Wassermann
Financial Adviser
(Business Manager)



Calvin Boonzaier
Wealth Manager



Alexander Palin
Wealth Manager



Meet the team



Brink Botha
Paraplanner



Rudolph Janse Van Rensburg
Paraplanner



Megan Britz
Paraplanner



Marli Du Preez
Client Care Liaison



Frans Legodi
Office Administrator



Nicola De Bruin
Marketing Liaison



Rita Strauss
Accounts Professional



Elna Coetzer
Sanlam Sales Consultant





Contact us

Tel 012 023 1408

WhatsApp 064 961 4830

E-mail nicola@herbstbluestar.co.za

Address 206 Bancor Ave, Mercedes-Benz Place, 4th Floor, Menlyn Maine, Waterkloof Glen, Pretoria, 0010

Website www.herbstbluestar.co.za



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