

Imperium
BlueStar

authorised by  **Sanlam**

Get the financial advice you need

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Get the financial advice you need with **Imperium 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 Imperium 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 Imperium 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. 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 Imperium 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

Imperium BlueStar Financial Services consists of a team of specialised financial advisers focused on providing financial peace of mind to our clients. With over 100 years of experience and an investment book of more than R2,8 billion under management on the Glacier platform, of which R1,6 billion is invested in our own tailor-made wrap funds. Our team of investment specialists, supported by a dedicated team of support staff will provide you with expertise to guide and support you through every event in your life.

Our service is based on the following values:

Integrity – Our strong ethical values ensure that your individual needs always receive first priority.

Expertise and Independence – Our knowledge and experience will empower you to make informed and appropriate choices that will offer you complete peace of mind. You have the freedom to choose between products of the major players such as Sanlam and Glacier. You can rest assured that our advice is backed by Sanlam.

Commitment and confidentiality – we understand that continued financial prosperity depends on dedicated and comprehensive financial planning. Our clients share this vision and we work in partnership with them to achieve their financial goals. The confidentiality of your financial and personal information is important to us, so no information will be disclosed without your written consent. We will be available at any time to review your financial plan to make sure that it keeps pace with your changing needs and circumstances.





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



Medical insurance

- Gap Cover
- Medical Aid (Bonitas / Fedhealth)

Estate Planning

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

Loyalty Program

- Reality



Meet the team



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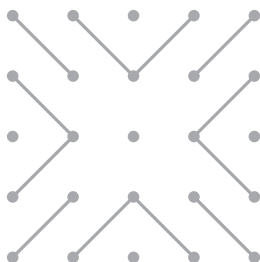
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