



Incoast
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 **Incoast 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 **Incoast 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 Incoast 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 Incoast 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

Incoast BlueStar consists of a team of professional, specialist financial advisers and experienced staff who will pro-actively partner with you in your voyage to financial independence.

Our main offices are located in Vredenburg, enabling us to service the West Coast and surrounding areas. As our client, you can always be confident in the advice and services we offer, which are firmly built on the pillars of:

- Personal relations
- Confidentiality
- Transparency

- Comprehensiveness
- Passion
- Honesty

Our clients are serious about financial freedom and understand the importance of good financial planning. Through our team of experienced professional advisers and experienced staff, we can support you on this journey. Our staff are handpicked for their unique capabilities, client focus, knowledge and professionalism. All in all, we have more than a decade's worth of experience in the financial industry, thereby ensuring piece of mind to our clients.



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
- Vehicle
- Liability
- Accident
- Household

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 (Fedhealth)

Employee Benefits

- Retirement funding

Loyalty Program

- Reality

Estate Planning

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

Through our association with our partners, we can offer clients access to the following services:

- Accounting and Tax Services
- Legal Advice



Meet the team



Morné Saunders
BlueStar Principal
Owner



Ruhan de Villiers
Financial Planner



Natanya Saunders
Short-term Insurance
Adviser



Kayla Pretorius
Sales Assistant





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Sanlam Life Insurance Limited is a licensed life insurer, an authorised financial services provider and a registered credit provider (NCRCP43).