



The background image shows a man in a dark t-shirt standing and writing on a whiteboard. Two women are seated at a table in the foreground, looking towards the whiteboard. The whiteboard contains handwritten notes and diagrams. The overall scene is dimly lit with a blue tint.

# IntelliPlan 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 **IntelliPlan 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 **IntelliPlan 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 IntelliPlan 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 an IntelliPlan 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

**We work actively with you to achieve financial independence and sustainable wealth.**

IntelliPlan BlueStar is based in Vanderbijlpark, Gauteng, but we service clients countrywide. We provide specialised financial planning, insurance, retirement and investment services to individuals and businesses. We are a professional business with more than 29 years of experience in the financial services industry. We subscribe to and support our profession's codes of conduct.

The staff of IntelliPlan BlueStar are carefully selected for their unique skills, client focus and professionalism. Together they have more than 66 years of experience in the industry, ensuring our customers fast and accurate service.

Our advice is solutions driven by your needs. We have a stable history of success which we have achieved through our knowledge of markets, products and companies. We believe in giving you trusted advice, delivered with integrity.



# 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 insurance
- Buy and Sell insurance
- Contingent liability

## Short-term Insurance

- Property
  - Personal
  - Commercial / Business
- Vehicle
- Liability
- Accident
- Household
- Agriculture

## 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



**Natie Botha**  
Principal  
Financial Adviser  
Investment Specialist



**Danie Henwood**  
Senior Financial Adviser



**Marlize Parker**  
Office Manager



**Chantél Bruyns**  
Administrative Clerk



**Alinah Msibi**  
Receptionist





## Contact us

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