



Lighthouse
BlueStar

authorised by  **Sanlam**

Get the financial advice you need

[Read more >](#)

Financial Planning

| Investments

| Insurance

| Retirement

| Wealth

Get the financial advice you need with **Lighthouse 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 Lighthouse 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 Lighthouse 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 Lighthouse 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're diligent, vigilant and caring: Lighthouse BlueStar charts the way to your financial freedom. We empower you with strategies for life-long financial independence.

Our clients have a vested interest in achieving financial security, and understand the importance of financial freedom. We help them achieve this by providing them with:

Comprehensive financial planning

The Client Experience

- A caring culture as embodied by our company name and ethos, Lighthouse;
- A successful track record, which has been achieved through our knowledge of markets, products and companies;
- An unyielding belief in a personal, caring, and committed relationship with our clients; and
- Our proven Wrap Fund investment track record.





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
- GEPP

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



Medical insurance

- Gap Cover

Employee Benefits

- Retirement funding

Estate Planning

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

Loyalty Program

- Reality

In association with our partners we can offer:

- Accounting and Tax Service
- Legal Advice



Meet the team



Nicky White
Principal
B.A.,S.T.D.,D.F.E



Graham White
Investment Specialist
BCom (Acc), Hons (Fin.
Plan), Adv Post Grad
(Investments)



Juan Engelbrecht
Risk Analyst
BCom Risk
Management



Liza Correia
Practice Manager



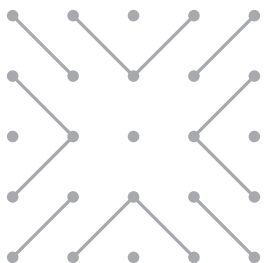
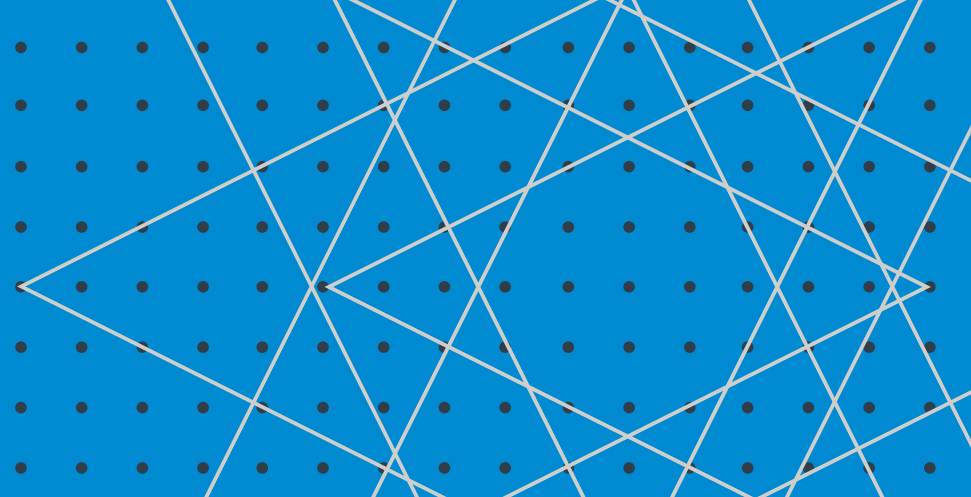
Tebo Moiloa
Paraplanner



Christelle Bezuidenhout
New Business Officer



Contact us



T 011 6788997

E info@lighthousefs.co.za

W www.sanlam.co.za/bluestar/Lighthouse/Pages/default.aspx

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