

Marlin
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 **Marlin 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 Marlin 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 Marlin 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 Marlin 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

Marlin BlueStar is a personalized advice service providing values-based, specialist financial advice and service designed to help our clients realize their lifetime dreams and goals.

Our Vision

We aim to be consistent, stable and to build authentic relationships based on respect. We aim to be financially sustainable and build a strong team culture within the business. Our short-term goal is to become a professional business offering world-class solutions with systems in place.

Our medium-term goal is to create a qualified adviser force (CFP) with good thought processes and a strong back office to service our clients effectively. Our business has stood the test of time, we are relationship focused and we all share the same vision. In the long-term, we intend to build a sound investment portfolio, a strong legacy, good succession and life-long customer relationships.

Our purpose is to serve as a one-stop-shop for clients by providing a whole spectrum of planning solutions (holistic financial planning) using our network of resources (collaboration) to service our clients.

What do we do?

We provide professional, well-researched solutions for risk on investment and create financial surety for the client to build and maintain their wealth. We utilise each other's strengths to make the client's goals a reality.

Professional Values

We offer ethical advice and tailored solutions for your unique financial situation. We offer alternatives so clients can make informed decisions. We put the client's needs first and take accountability for the advice we render.

How do we do this?

Through continuous professional development (CPD). We focus on increasing our knowledge base and investing in our back office to deliver consistent after-sales service in order to reduce turnaround times. We invest our time in assisting you to understand your financial needs and aspirations. We believe in developing a mutual understanding and unique, well-researched solutions to provide you with a roadmap to financial independence.

Specialist Investment Advice and Service

Thanks to the Implemented Consulting process we offer a number of our own Wrap Funds managed with Sanlam Multi Manager.

We have a Fund for every risk profile to accommodate every need and help our clients drive their finances successfully. More information on these Funds can be found on our website.





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
 - Commercial / Business
- Household
- Agriculture
- Director's Liability
- Vehicle
- Liability
- Accident

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



Medical insurance

- Gap Cover
- Medical Aid (Bonitas / Fedhealth)

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



Carel Bouwer
CFP® Principal
Investment Professional



Alistair Preston
CFP® Director
Senior Financial Planner



Denton Wilmot
Director
Investment Specialist



Anriette Scholtz
CFP®
Para Planner



Marc Burger
CFP®
Financial Planner



Pieter Myburgh
Financial Planner
Investment Specialist



Ivan Nel
Investment Specialist



Christo Nortje
Financial Planner



Natasha Gouws
Financial Adviser



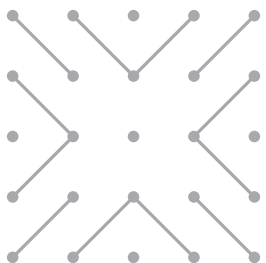
Jaco Greeff
Financial Planner



Talita Broeksma
Financial Planner



Contact us



T 041 3630712

E info@marlinbluestar.co.za

W www.sanlam.co.za/bluestar/Marlin/contact/pages/default.aspx

 /BlueStar

