



Get the financial advice you need

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Financial Planning

| Investments

| Insurance

| Retirement

| Wealth

Get the financial advice you need with **Mereo 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 Mereo 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 Mereo 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 Mereo 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 value our clients time and prefer to focus on those who value ours to structure a suitable financial plan for their individual needs.
- Focus on holistic financial planning to clients who want to achieve financial independence.
- We believe in what we do by assisting clients to plan for the unforeseen and the future.
- We believe in offering all aspects of financial planning with our holistic service offering by having all the necessary experience and professional expertise available to our clients.

Mereo BlueStar has offices in St Helena Bay and Kuils River in the Western Cape, and provides specialised financial planning, tax planning, insurance, retirement and investment services to individuals and businesses.

Our team consists of a number of financial planners who specialise in different financial disciplines, which allows us to provide our clients with a greater depth of knowledge, servicing all financial needs and requirements from a single location. This customised approach takes into consideration the complexity and uniqueness of each client's position, so you can rest assured that your specific financial needs will be catered for.





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



Donlyn Mulder
Senior Financial Planner
CFP



Wentzel Pretorius
Senior Financial Planner
(NQF5) Wealth
Management



Chante Swart
Administrative Assistant
(Kuil River)



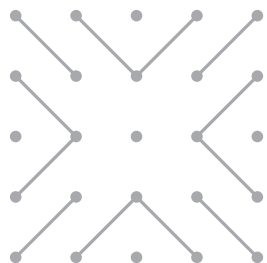
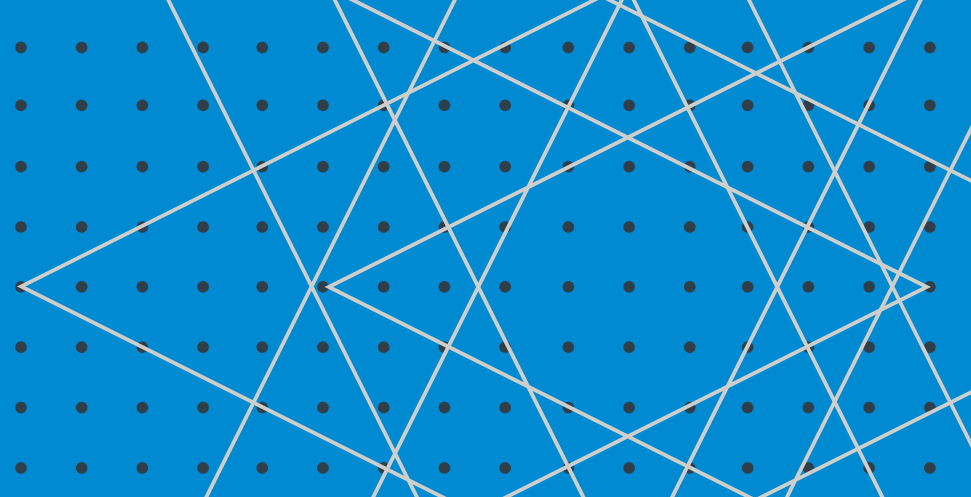
Willie Moller
Administrative Assistant
(St Helena Bay)



Kelly-Ann Mulder
Practice Manager



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