

Northern
BlueStar

authorised by  **Sanlam**

Get the financial advice you need

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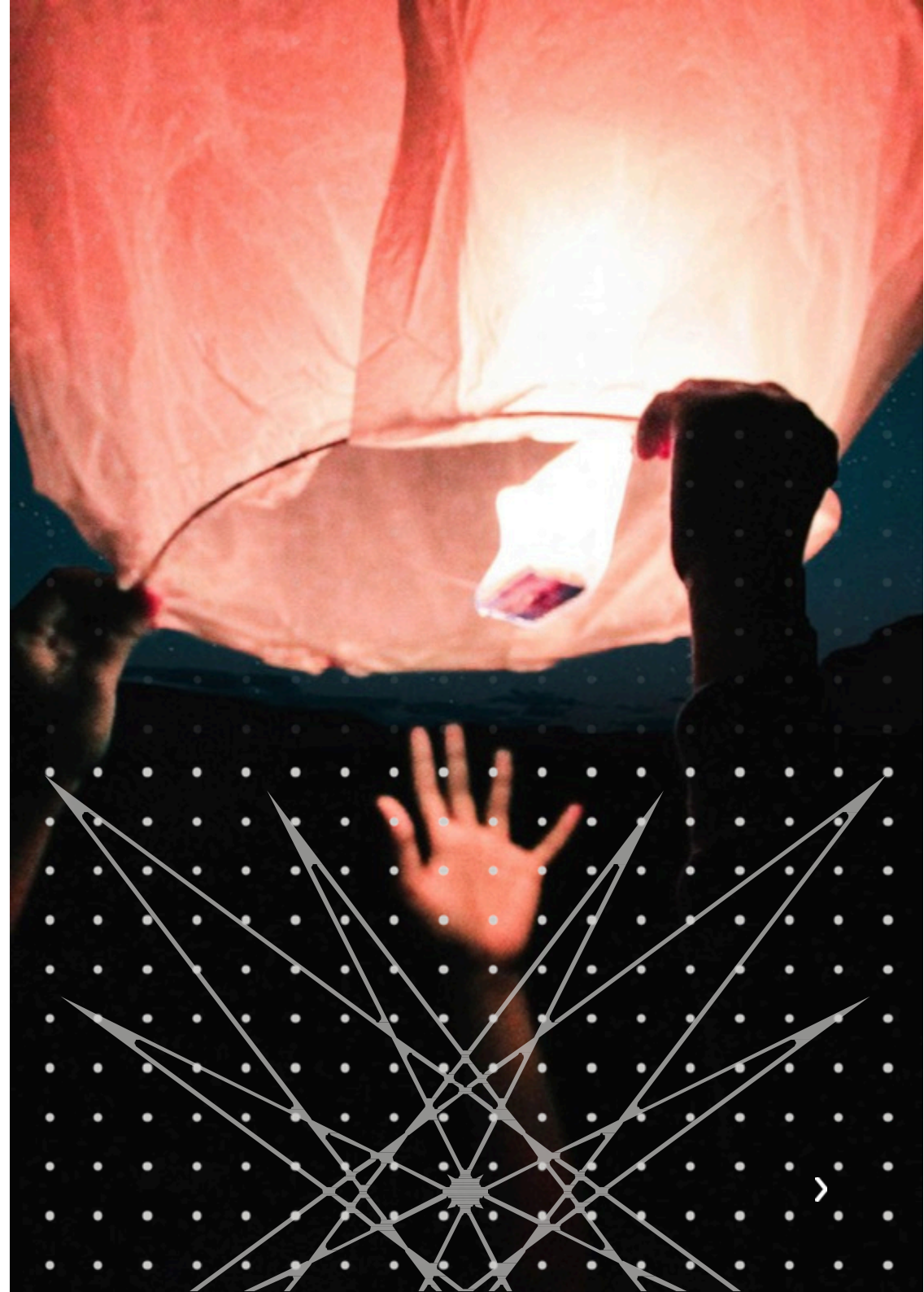
Get the financial advice you need with Northern BlueStar

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 Northern BlueStar, we offer you holistic advice to help you reach your financial goals, achieve sustainable wealth and gain peace of mind.

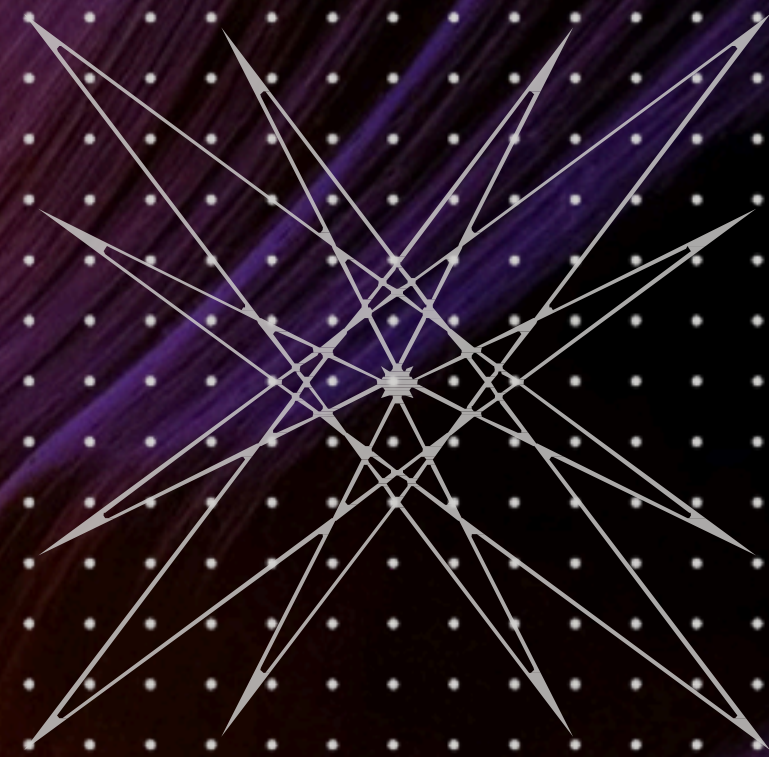
But what is it that sets a BlueStar business like ours apart?

We are an award-winning, independently owned Sanlam BlueStar practice that is delivering comprehensive financial planning solutions across South Africa,- powered by CFP®-qualified leadership, exceptional administration, and an entrepreneurial spirit.



Our Vision

Our Vision is to be South Africa's most trusted, client-focused financial planning practice in delivering holistic solutions for lasting financial security.



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.



Continuity and peace of mind

A range of financial expertise under one roof

At Northern 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.

As a Northern 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

Here at Northern BlueStar we understand how tough it can be to create and protect wealth. It is something that takes years of financial discipline, tough choices and personal sacrifices. That is why we are passionate about assisting you in achieving your financial goals.

We believe that true wealth - the kind that ensures financial independence - is more easily achieved through partnering with experts. Experts that have the necessary skills, knowledge and administrative support to ensure that they can stay with you throughout this long and arduous journey.

That is why, when you partner with us, you can rest assured that you will get tailor-made financial advice, backed by client service that will ensure that your financial independence becomes a reality.

We aim to create a personal and warm experience with every interaction in order for you to enjoy peace of mind, knowing that all your financial affairs are well planned, in order and properly managed.



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 Planning

- Retirement Annuities
- Pension Funds
- Provident Funds
- Preservation Funds
- Living Annuities

Short-term Insurance

- Personal Insurance
(Santam / Erchelon / MiWay)
- Commercial Lines

Medical Insurance

- Gap Cover
-

Investments

- Tax-free investments
- Unit Trusts
- Various options on LISP
(Linked Investments)
- Collective Investments
- Shares
- ILLAs / ILLIs
- Endowments
- Preservation funds
- International / Offshore options
- Life Annuities
- Term Annuities
- Saving plans
- Short & Long term Investments
- Diversified investments –
Glacier by Sanlam
- Bespoke Portfolio's =
Sanlam Private Wealth



Employee Benefits

- Retirement funding
- Group Life
- Group Income Protector

Estate Planning & Administration

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

Loyalty Program

- Sanlam Reality
- Wealth Bonus
(on qualifying products)

In association with our partners we can offer by referral:

- Accounting and Tax Services
- Legal Advice
- Short-term Personal & Commercial (with all major insurers)
- Medical Aid (with all major Product Providers)
- GAP Cover



Meet our team of Financial Planners



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