



Get the financial advice you need

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Financial Planning

| Investments

| Insurance

| Retirement

| Wealth

Get the financial advice you need with **Optume 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 Optume 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 Optume 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 Optume 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

At Optume BlueStar we believe that careful planning and well thought out strategies – rather than quick-reaction impulsive maneuvers – may provide the best path to maintaining and building your wealth.

We also understand our client's need more than information. That it takes committed and knowledgeable professionals to put that information into context; to know you, your needs, and your stage in life; to determine which planning strategies complement your goals now and years into the future.

With this understanding, we work closely with our clients to address their needs for investment planning, retirement planning, and estate planning. We then design, implement, and monitor appropriate investment strategies and risk management solutions appropriate to their particular situation.

We are committed to developing and implementing a comprehensive Wealth Management Plan to guide you in the pursuit of your financial goals and aspirations.

- We take the time to learn about your individual financial goals and objectives, help you identify potential gaps in funding your goals, and review which alternatives for pursuing them might be appropriate.
- We consider your current situation and future goals and attitudes toward risk, recommend appropriate strategies designed to help pursue your goals; and work closely with you to implement and monitor these recommendations.
- Working from the plan we develop, we will help you stay on track to achieving your goals by adjusting these strategies as necessary to meet your changing needs, or to adapt to changing economic conditions.

Throughout our relationship, the financial decisions you make based on your personal Wealth Management Plan may allow you to feel more confident in planning for your future, and stay focused on the life issues and goals that matter most to you and your family.





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
- Engineering
- Liability
- Aviation
- Accident
- Marine

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

In association with our partners we can offer:

- Accounting and Tax Service
- Legal Advice



Meet the team



Frikkie Wolfaardt
Certified Financial Planner (CFP)
BCom | IQA



Andrew Jean Jacques
Senior Financial Planner
IQA



Franc Malan
Certified Financial Planner (CFP)
IQA



Estelle Antoine
Senior Financial Planner
IQA



Tea Massyn
Assistant



Charmaine Maraz
Administrative Clerk



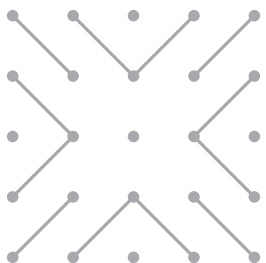
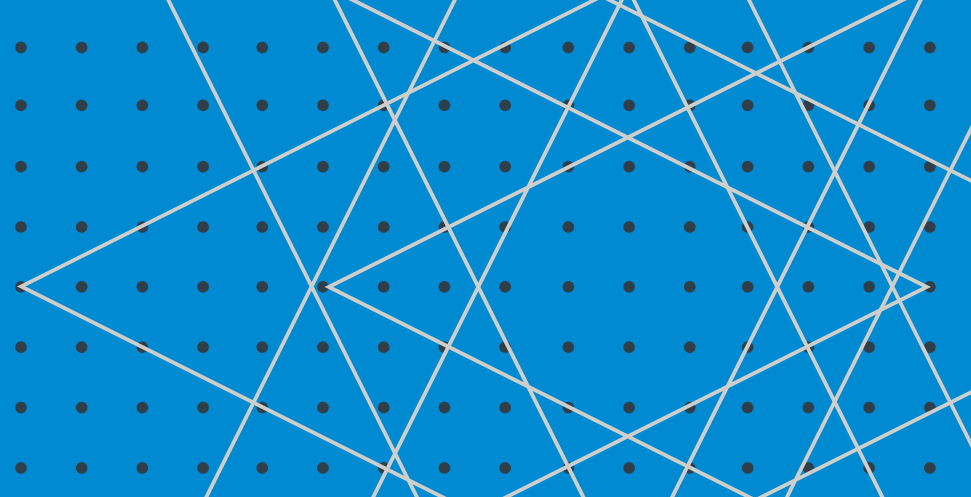
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