



Get the financial advice you need

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Financial Planning

| Investments

| Insurance

| Retirement

| Wealth

Get the financial advice you need with **Ori-Vaal 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 Ori-Vaal 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 Ori-Vaal 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 Ori-Vaal 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

Vision

It is our vision to be a leading wealth creator providing comprehensive financial advice to clients and to become one of the top service providers in the market

Mission

It is our mission to provide realistic, holistic financial advice, by:

- Being adaptable and responsive to change in line with our clients' ever changing needs;
- Being the leading provider of realistic holistic financial advice; and
- Managing a sustainable and profitable business on sound business principles.

In our business we are passionate about family values and share these values in a professional manner with all clients.

Communication with our clients is essential to our business, therefore we continuously encourage our clients to give us feedback on how we can improve our service delivery.

We thrive on exceeding our clients' expectations and we go the extra mile for each and every client who is part of our family. To be more accessible, we have developed new ways of communicating with clients via digital platforms, for example our Ori-Vaal website (<https://www.sanlam.co.za/bluestar/Ori-Vaal>). We also show our appreciation by getting involved in the community.





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
- Engineering
- Vehicle
- Liability
- Accident
- Aviation
- Marine
- Household
- Agriculture

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



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 Services



Meet the team



Gert Jacobs
Principal
Financial Adviser



Loretta Jacobs
Financial Adviser



Wynand Jacobs
Principal
Financial Adviser



Riaan Jacobs
Principal
Financial Adviser



Lizette Jacobs
Financial Adviser
Short term Insurance



Johan Bornman
Financial Adviser



Mandie Van Zyl
Financial Adviser



Wouter Badenhorst
Financial Adviser



Deidre Marais
Back Office
Short term Insurance



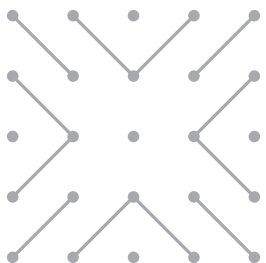
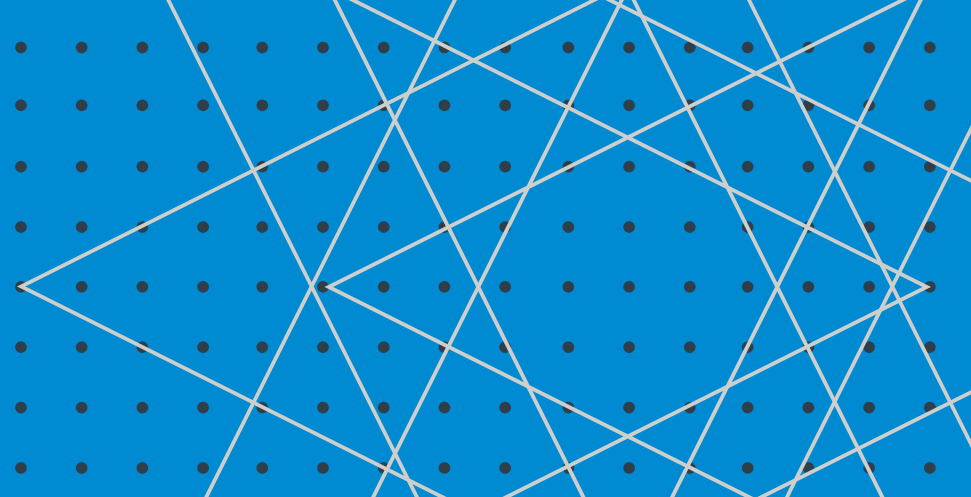
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Back Office
Life Insurance



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