



Palacio
BlueStar

authorised by  **Sanlam**

Get the financial advice you need

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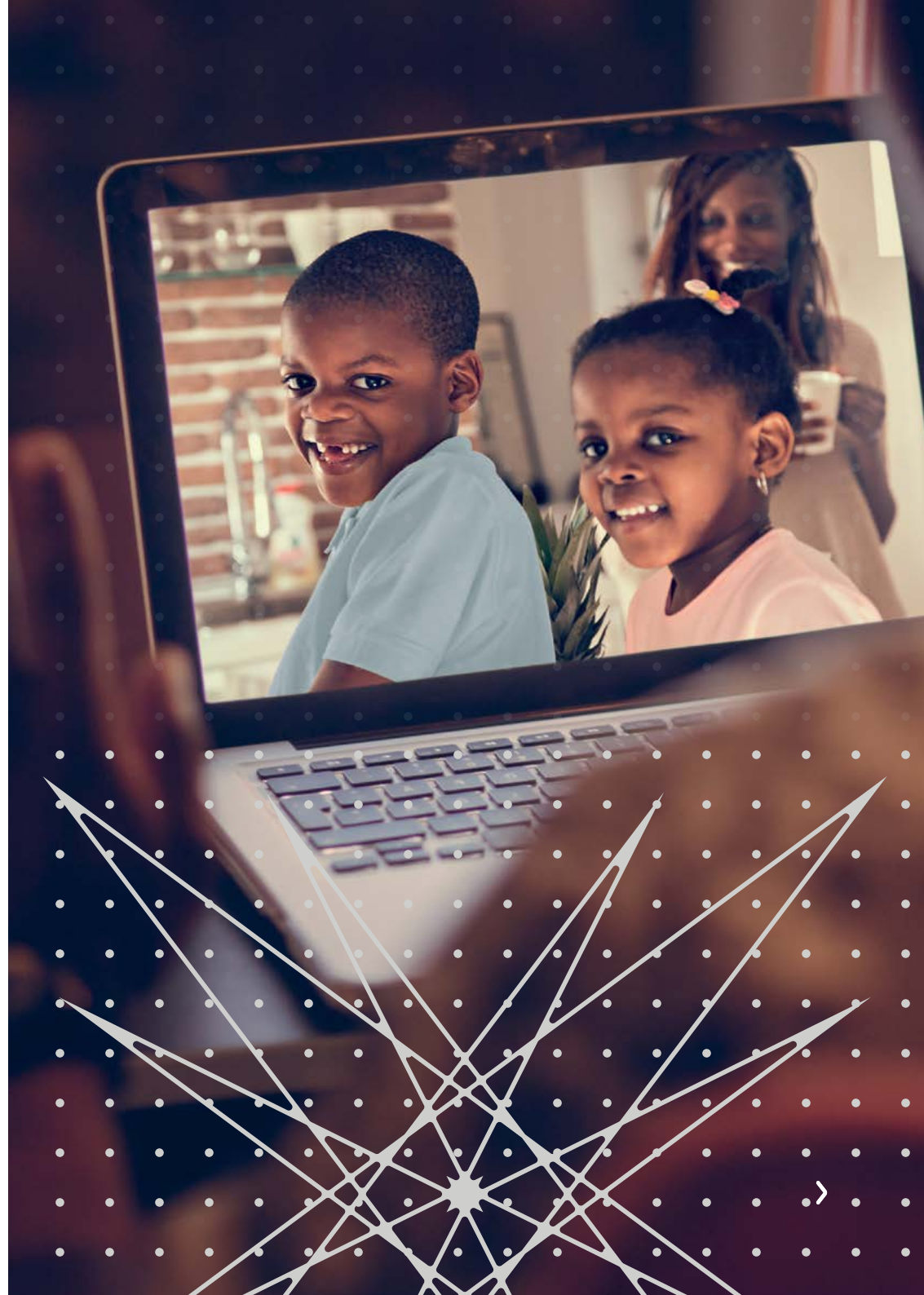
Get the financial advice you need with **Palacio BlueStar**

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. At Palacio 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 Palacio 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 Palacio 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 Palacio BlueStar, we are professional financial advisers with experience in helping our clients meet their financial goals. We have a team of qualified back-office staff to make sure we provide excellent service and deliver on our promise.

- We seek to understand the things in life that are important to our clients, and translate those opportunities, goals and concerns into a financial plan that meets their needs.
- We identify potential solutions to help build an ongoing plan. We have access to a full range of financial solutions and products that can help you reach your short- and long-term goals. We believe in our clients' ability to make their own decisions about the financial aspects of their lives and feel we can best serve them by empowering and giving them the benefit of our experience and expertise.

We work with you as your partners in tying your financial resources to your life needs. We view our relationships with clients as true partnerships, demanding honesty, sharing and a joint search for ideas and solutions that will enrich their lives.





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

Estate Planning

- Wills

Loyalty Program

- Reality

Retirement

- Retirement Annuities
- 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



Meet the team



Bongiwe Sidumo-Jaggers
Authorised Principal
B. Juris, LLB, PGDipFP



Unabantu Godongwane
Financial Adviser
Bachelor of science



Nozabalise Soga
Financial Adviser
Diploma in Business Management



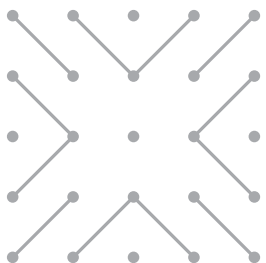
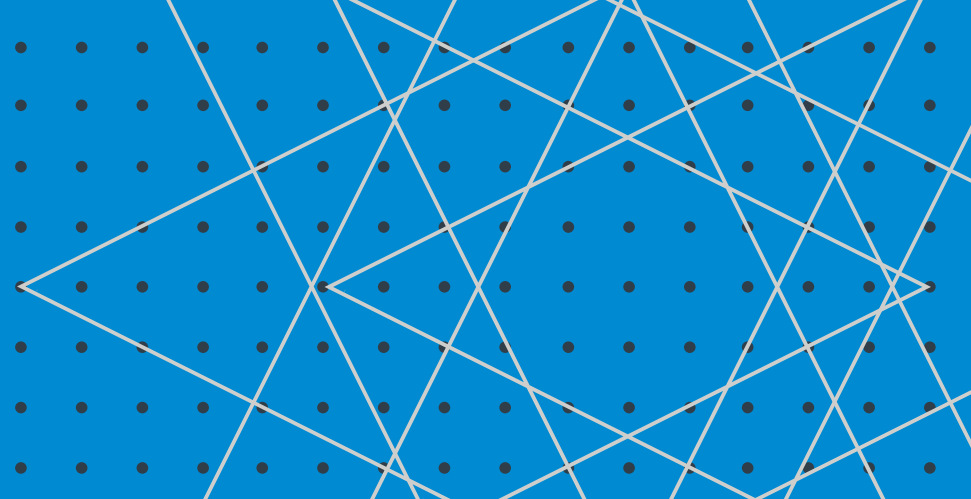
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