



Get the financial advice you need

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Financial Planning

| Investments

| Insurance

| Retirement

| Wealth

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

Our mission and vision are to assist clients with honest and sustainable financial advice that is in line with their needs and goals. Client service is very important to us, which is why we try to address clients' needs as quickly and effectively as possible. We want to be more than just another service provider. We want to be part of your family and understand the challenges you face. By so doing we can provide you with a much more effective service. On a daily basis we encounter people struggling in their retirement because they did not make adequate provision for it. It acts as even greater motivation for us to assist clients and to ensure they have a plan should the unforeseen happen.





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
- Vehicle
- Liability
- Accident
- Household

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

Loyalty Program

- Reality

In association with our partners we can offer:

- Accounting and Tax Services
- Legal Advice



Meet the team



Kiewiet du Plessis
BlueStar Principle / Financial Adviser
Specialise in Investments & Risk cover



Philfin du Plessis
Financial Adviser
Specialise in Investments & Risk cover



Awie du Plessis
Financial Adviser
Specialise in Investments & Risk cover



Mareika Nortje
Financial Adviser
Specialise in Investments



Rochelle van der Merwe
Client Services Consultant



Lourette Barnard
Administration / Client Services
Consultant



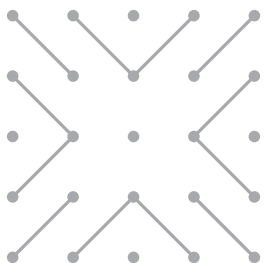
Johan Pieterse
Short term Adviser Specialist
in Santam Personal and
Commercial Insurance



Anina du Plessis
Administrator



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